

The background of the top half of the slide is a photograph of a man and a woman in business attire shaking hands in front of a modern glass building. The man is on the left, wearing a dark suit and glasses, and the woman is on the right, wearing a light blue blazer. They are both smiling.

Reimagining asset and wealth operations

- **Upto 70% cost saving through Global Delivery Model and RPA/AI interventions**
- **Enhanced Customer Experience**

Driving operational excellence through a consultative approach, utilizing a blend of expertise in business processes, domain knowledge, and technology.



ASSET & WEALTH MANAGEMENT

With a consultative approach and a fusion of expertise in business processes, domain knowledge, and technology, our Asset and Wealth Management solutions deliver enhanced customer experience, improved compliance, and higher quality while reducing costs. Our team of financial services professionals efficiently supports over 500 business processes from various global locations.

KEY STATISTICS

2500+
Professionals

2 of Top 5 US
Broker Dealers

50,000+ Advisors
Supported

100+ Product
Development

20 US & Global
Institutions

40+ Business
Transformations

INDUSTRY SEGMENTS SUPPORTED



Asset Management



Trust & Custody



Wealth Management



Broker Dealer



Private Banking



Hedge Fund

OUR STRENGTHS

Deep domain understanding having **20+ years** of industry experience supported by **~550 professionals**. Over 3.5 million annual transactions

Extensive **Experience working with market leading platforms** in the Asset & Wealth management, and Custody space

Proven track record of driving **Digital Transformation** leveraging **RPA/ AI, Analytics,** and Proprietary **Tools & Accelerators**

Operations Excellence rigor using Lean, Six Sigma and Continuous Improvement levers

Enhanced Operations Visibility leveraging right Metrics and Dashboards

Global Delivery Model, having an intelligent mix of Onsite, Nearshore & Offshore staffing

OUR CAPABILITIES

Trust & Custody

- Onboarding & A/C Admins
- Ref. Data Management
- Transfers IN/OUT
- Correction & Reversals
- Reconciliation
- Corporate Action
- Funding
- Settlements
- Performance Measurement & Reporting
- Fee & Invoicing
- Benefit Payment Services

Investment Management

- Client Onboarding
- Securities Setup & Pricing
- Ref. Data Management
- Trade Matching
- Fails Management
- Performance Measurement
- Portfolio Accounting
- Regulatory/ Investor/ Performance Reporting
- Reconciliation
- Commission, Fee & Billing
- Brokerage Services

Broker Dealer Services

- Client Onboarding
- A/C Admins
- Securities Setup & Pricing
- Trade Enrichment
- Trade Confirmation
- Clearing & Settlements
- Fails Management
- Funding
- Accounting: client accounts, transactions, and fees
- Reporting



SOLUTION ENABLERS

Customer Experience

- CX Transformation
- Digital-First Omnichannel Services
- Workforce Transformation
- AI-Driven Smart Processes

Finance & Accounting

- Procure to Pay/ Payables
- Order to Cash/ Receivables
- Record to Report
- HNI, Family Offices
- Controllership

Information Security

- Risk Management
- IT Security/ Monitoring
- Id & Access Management
- Vendor Management
- Business Continuity

Reporting & Analytics

- Data Analytics
- Data Governance
- Data Quality
- Data Architecture
- Master & Reference Data

DIGITAL ENABLERS



Wealth Advisory Framework



Automating QC, Risk Management & Regulatory Compliance



Conversational AI and automation



Intelligent Document Processing



Enterprise Grade SaaS Platform For Workforce Productivity

CASE STUDIES



Simplified customer on-boarding for a global Financial Services Client



Transforming stakeholder on-boarding for a Financial Services Leader



Transforming operations using intelligent automation CoE for a global Investment Management Company



Transforming advisor acquisition with 80% lower time-to-market for a US Wealth Management Platform Leader

About Coforge Business Process Solutions

Coforge is a global digital services and solutions provider, that enables its clients to transform at the intersect of domain expertise and emerging technologies to achieve real-world business impact. Coforge leads with its product engineering approach and leverages Cloud, Data, Integration and Automation technologies to transform client businesses into intelligent, high growth enterprises.

Coforge BPS drives Business Process Excellence using deep domain expertise and Technology platforms led by consultative practitioners. Coforge BPS customers include 5 of the Top 25 U.S. Banks, Top 10 Lenders, Top 10 Insurance intermediaries, and Fortune 500 Companies.

Our optimal blend of people, process, and digital solutions across the business value chain has helped drive tangible outcomes for our clients, their customers and partners.



Banking &
Financial Services



Mortgage, Title Insurance
& Property Tax



Insurance



Travel, Transport
& Hospitality

Highlights

23,000+
Employees globally

\$1 Bn
FY23 Revenue

140+
Clients

12+ years
Average tenure of
Top 10 customers

55+%
Revenue from
BFSI

21
Countries

26
Delivery Centers

Coforge



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