Private Wealth

One connected platform for advice, portfolios and trading

South Africa

Introduction

Delivering exceptional outcomes for private clients is increasingly complex.

Heightened competition and regulatory expectations place greater demands on advisers, yet many firms still rely on multiple disconnected systems for advice, trading, client management and portfolio oversight.

Iress Private Wealth simplifies this complexity. It brings everything together in one integrated, cloud-based platform that connects your entire wealth management workflow.

With a single view of each client, streamlined workflows and embedded risk management, the platform reduces administrative burden, lowers operational costs and helps advisers stay focused on what matters most: your clients.

What is it and what does it do?

Iress Private Wealth is a fully hosted, end-to-end wealth management platform that unifies:

- **Client management**
- **Financial advice**
- **Portfolio management**
- **Order management and execution**
- **Market data and connectivity**
- **Revenue and business reporting**

What is it and what does it do?

Delivered through a single sign-on adviser desktop, the platform provides a comprehensive view of each client across all portfolios, data and interactions.

It enables firms to manage the full client lifecycle, construct and manage multi-asset portfolios, execute trades with integrated compliance controls, integrate with custodians and back-office providers, and deliver a secure, branded client experience.

The result is one connected platform that supports better decisions, faster execution and more consistent client outcomes.

Client interface

Company branded

integrated online account

Real-time view of assets

Secure two-way messaging and document sharing

Pre- and post-trade integration

Wholesale custodian

Executing brokers

Market makers (RSP)

Insurance providers

Retail platforms

Product providers

Adviser desktop / interface

(single sign-on)

Client management

CRM

Diary

Document management

Workflow / tasks

Secure email & document execution

Revenue management

Business reporting

Advice

Fact find

Strategy modelling

Investment and protection option comparison

Mortgage / debt management

Advice recommendations & documentation

Review

Portfolio management

Multi-asset class

Multi-currency

Multi-back office / custodian

Single / bulk modelling

Corporate actions

Datafeeds

Comprehensive reporting

Tax management

Middle office

Account onboarding

Position management & investment accounting

Asset servicing

Cash management & accounting

Order management

Market data

Order execution

Order routing

Pre- and post-trade compliance

Broker connectivity for direct market access

Compliance ▪ System Management ▪ Configuration ▪ Security ▪ Data Warehouse & Connectivity

Client back office / internal systems

Features and benefits

Unified client management

Improves visibility, reduces administration and supports consistent, high-quality advice delivery.

One CRM. One client file. One complete view.

Bring all client records, documents, workflows and advice tools together in a single environment, with multi-device access and configurable desktops to suit your business model.

Integrated advice and portfolio management

Supports efficient, compliant advice and provides real-time insight into portfolio performance.

Fact finds, strategy modelling, investment comparisons and portfolio construction tools are built into the platform, alongside multi-asset and multi-currency portfolio management.

Trading and execution

Enables faster, scalable execution while reducing operational complexity.

One CRM. One client file. One complete view.

Integrated market data, order entry, routing and execution with built-in pre- and post-trade compliance. Bulk portfolio rebalancing, order execution and trade allocation can all be managed from one environment.

Connected ecosystem

Eliminates disconnected processes and improves operational efficiency across the investment lifecycle.

Seamlessly connect with brokers, custodians, product providers, insurance providers and retail platforms through one integrated system.

Secure client engagement

Enhances client relationships with a modern, always-on digital experience.

One CRM. One client file. One complete view.

Deliver a branded client portal with real-time portfolio visibility, secure messaging, document sharing and digital execution capabilities.

Built-in governance and insight

Reduces risk, strengthens governance and supports informed business decisions.

Integrated compliance controls, configurable risk tools, reporting dashboards and revenue management provide full visibility across your business.

Ready to simplify your technology ecosystem and deliver more for your clients?

Visit iress.com/privatewealth or speak to your Iress Account Manager to discover how Iress Private Wealth can help you streamline workflows, reduce risk and drive stronger performance.