



Wealth & Asset Management

Wealth and asset management customers expect seamless customer service and fierce protection of their data. But siloed departments and point solutions make it nearly impossible for financial institutions to deliver integrated, automated, anytime-anywhere service for clients and employees. Meanwhile, people-intensive processes drive operating costs ever higher. What you need are self-service tools that empower clients to take a more active role in their financial journey and end-to-end business processes that originate in the front office then automatically engage all necessary stakeholders. Integrated workflows on the back end should orchestrate the right actions to the right people across the front, middle, and back offices and deliver the data needed to get the right actions done. Leveraging a single platform to do this also provides the ability to proactively monitor and address cases that pose a risk of customer abrasion—or any other risk.

Enter ServiceNow – The Platform of Platforms

Operationalize Client Relationships

Automate middle and back office processes, including complaint management, billing/account issue resolution, fund/plan administration, portfolio visibility, common issue resolution, and performance reporting. Create a digital customer service experience with end-to-end visibility that empowers wealth managers to make the right decisions and act faster for clients, driving increased client loyalty. Self-service functionality allows clients to address many common problems and account changes by themselves.

Transform Branch Workflow

Connect and automate fragmented, manual systems across the institution. Digitize processes, create real-time workflows, and ensure efficient advisor and client collaboration. With ServiceNow, you can streamline financial wellness processes and proactively service clients ensuring their best interests are consistently met.

Streamline Onboarding

Eliminate long onboarding times by connecting fragmented, siloed systems across middle and back offices. Create a single, digital system of employee engagement with end-to-end visibility for clients and advisors with a real-time audit trail. With ServiceNow, wealth & asset management firms can decrease costs as well as onboarding times, ensuring employees reach full productivity faster. And it doesn't stop there—ServiceNow supports every employee through their lifecycle, so you can be sure they're empowered to do their best work.

Continuity and Resilience

Integrate governance, risk, and compliance across technology, cybersecurity, people, property, and suppliers to ensure critical business services remain operational. ServiceNow automates the response to cyber threats and risks based on business impact. From GDPR to PSD2 to CMA—ServiceNow lets you keep up with regulations and reduce the costs and complexity of manual edits.

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