JAN 2024 NEWSLETTER

eBrokerSystems

eBroker's WMS

An intuitive Wealth Management Solution

In this highly competitive and rapidly changing financial market, we understand that you are constantly in search of innovative ways to attract new clients and engage them to grow your business.

How do you provide service to your clients professionally yet empower them with insights on their finger tips to stay on top of markets?

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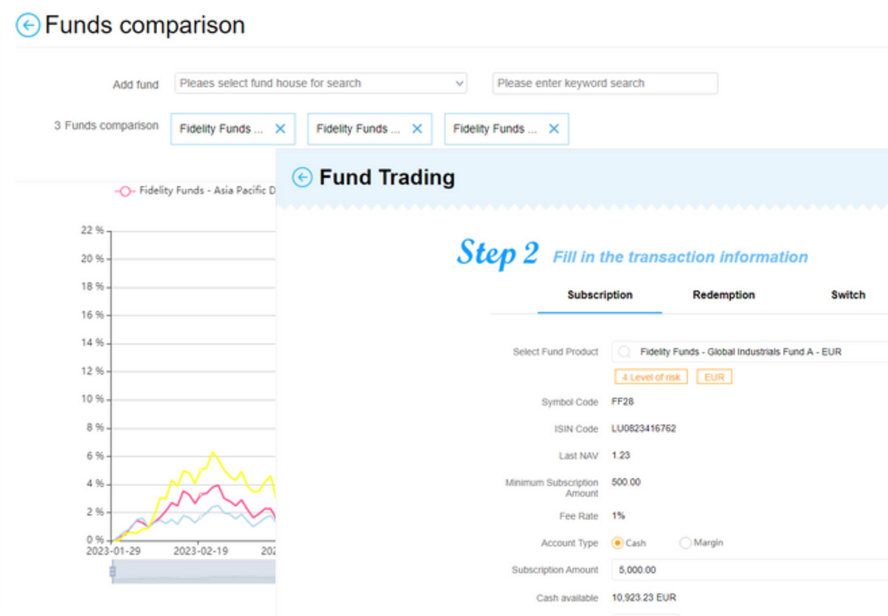
eBroker's Wealth Management System (WMS) is specifically designed to cater for diverse business needs in the Wealth Management arena. WMS supports different user roles and various asset classes, including funds, bonds, insurance, and cross-border options. It covers comprehensive wealth management services such as investment planning, customer relationship management, community/ forum setup to enable information exchange, empowering you to provide professional, yet user-friendly services to your clients using the latest technology.

Simplified Wealth Management for Investors

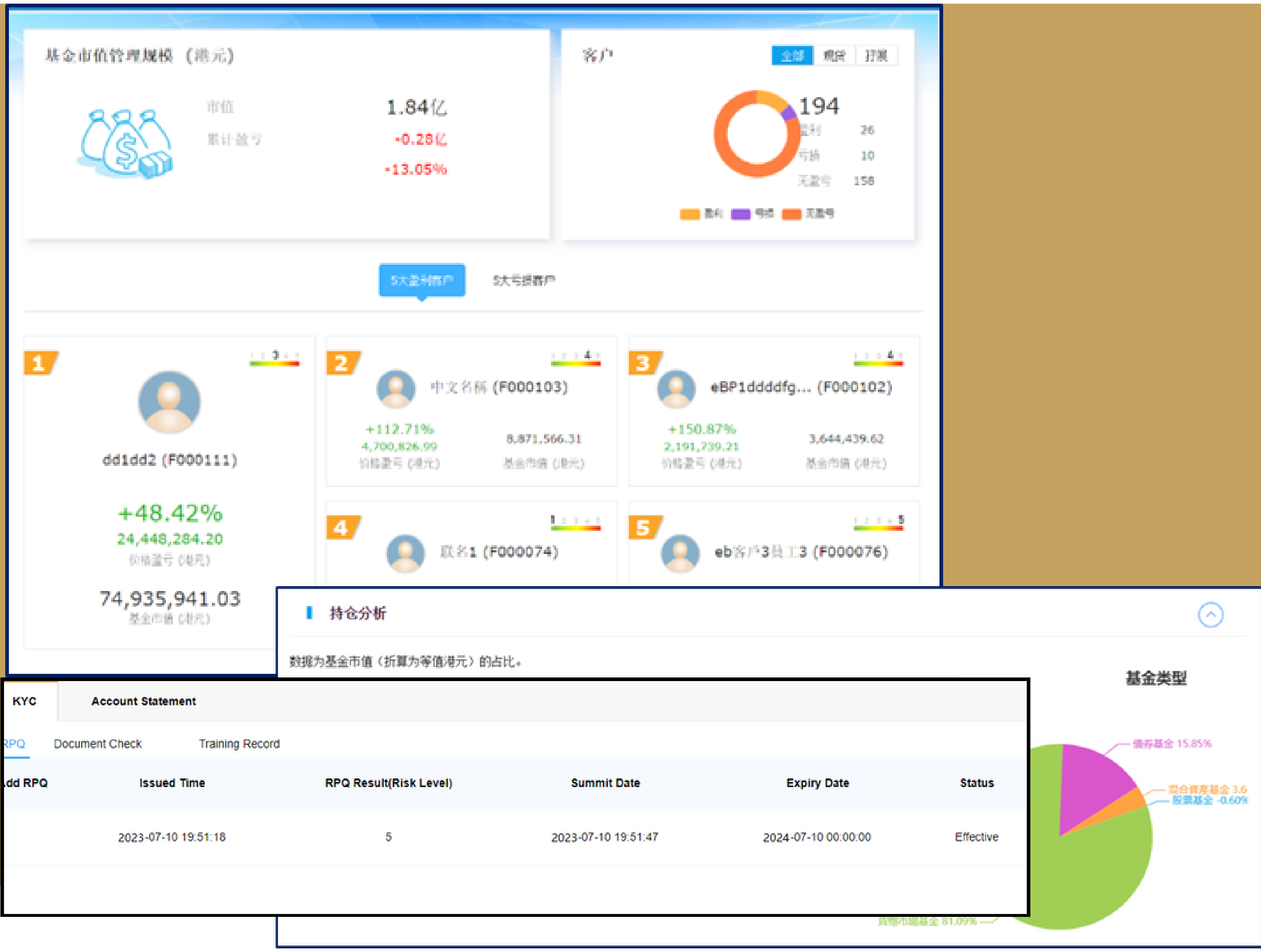
One-Stop Solution with for Investment Planning, Product Selection, Market Monitoring and Portfolio Tracking

- ✓ Real-time Market information to keep your clients on top of the markets
- ✓ Personalized watchlist of selected products & Performance Monitoring
- ✓ Easy Products Search & Products comparison with Performance Evalution
- ✓ Easy online investing, portfolio management & portfolio analysis



Powerful Wealth Management Tool for Wealth Advisors

- ✓ Track status of each business opportunity, create & execute investment proposals for clients according to their investment appetite
- ✓ Customize investment proposal for individual investors, track feedback & make adjustment accordingly
- ✓ Real-time online communication with clients & prompt exchange of update information
- ✓ Analyze clients' personal information, characteristics, & trading behaviours to customize investment proposals
- ✓ Conduct KYC procedure, perform risk assessments, monitor & update client's risk level regularly
- ✓ Setup Communities, blogs, live streaming rooms, etc.. to strengthen client interaction and provide on-demand professional advice



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