

The d1g1t Story

d1g1t's innovative wealth management software is designed specifically to provide investment advisors with the ability to deliver a differentiating client experience to their clients. Through institutional level analytics and leading-edge client facing tools, d1g1t clients are experiencing increased revenues.

The Challenges for Today's Investment Advisor

Today's investment advisor is managing more complicated portfolios with diversifying asset classes; facing increased regulatory oversight; and staving off intensified competition from large institutions, all while working with clients and prospects who are both more technologically savvy and levying more scrutiny on fees.

Meeting these challenges is extremely difficult without the proper systems in place. Many wealth managers still rely on outdated "legacy" software systems that are not well integrated and unable to effectively handle today's table stakes requirements, such as properly incorporating alternative investments. This prevents the advisor from having real-time conversations with their clients – a proven aspect to providing a top-of-the-line client experience that allows the advisor to differentiate themselves versus competitors.

d1g1t was founded to eliminate these limitations, empowering wealth managers to transition to a business model driven by institutional grade analytics; risk management; operational efficiencies and a single, integrated view of the client's wealth.

How d1g1t Addresses These Challenges

d1git's wealth management platform not only uses cutting edge technology, but it is designed to consider the needs of today's advisor. The world has changed over the last 10-20 years, leading high net worth investors away from simply stock and bond investments towards portfolios that include real estate, private equity, hedge funds, real assets – all in a variety of currencies. By being natively built in the web upon a structure of API connections, the software is designed to support end-to-end integrations that eliminate silos and the need to manage disparate systems.

If there is one thing that we know for sure, it's that the world will keep on changing – and this design ensures that d1g1t clients will be able to adapt when necessary.

The key attributes that set d1g1t apart from legacy wealth management software and providers are:

- Elevates client interactions through access to the latest information available in order to foster real-time answers to client questions.
- Provides the ability to manage all asset classes, including native support for alternative investments and off-book assets, within a single client view.
- Risk management tools that have been tailored to meet the specific needs of advisors.
- Goal-based investment analytics.
- Built-in integration capability that provides flexible configurations for any tech stack.
- White-glove service and financial engineering support.

A Proven Team of Financial Technology Experts

d1g1t was founded by experienced fintech entrepreneurs with a track record of successfully bringing cutting-edge technologies to the financial services market.

Over the past two decades, the d1g1t team has built and implemented risk and portfolio management systems for some of the world's top banks, institutional asset managers, hedge funds, pension funds, and insurance companies.

d1g1t's financial engineering team has accumulated significant analytics expertise through collaboration with renowned quants, academics, business users, and regulators. They have been able to harness this knowledge into a system that focuses on the client/advisor experience – unrivaled by any other platform in the industry.

