



SOLUTION SHEET:

# Institutional-Grade Enterprise Wealth Management Platform

d1g1t is an integrated Enterprise Wealth Management Platform that delivers scale and operational efficiencies to Multi-family Offices, RIAs, Broker Dealers, Custodians, and Bank advisor networks.

Powered by an institutional-grade performance and risk engine, the platform provides on-demand analytics which are consistently used across several integrated wealth management workflows that include reporting, billing, trading, compliance, and client engagement activities.

The platform processes millions of accounts instantly with lightning-fast execution, giving advisors all the information they need at their fingertips. This empowers firms to elevate the quality of their advice, demonstrate its value, and take every client conversation to a whole new level.

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## MORE THAN REPORTING

The integrated platform covers key aspects of the wealth management life cycle such as:

- **Client Advisory**

The user-friendly platform enables advisors to easily prepare for client meetings and monitor client portfolios. Advisors can analyze and review clients' portfolios in real time using institutional grade analytics and powerful simulation tools.

- **Digital Client Tools**

The interactive, white labeled client portal and mobile app (iOS/Android) enables firms to promote their brand (advisor photos and contact details), keep clients engaged, and elevate their client service. Firms can provide clients with 24/7 access to their portfolio and two-way sharing of documents such as news articles, statements, etc.

- **Client Reporting**

Produce personalized client statements and comprehensive regulatory/tax reports using a highly distributed reporting infrastructure.

### Key Benefits:

- Elevate the Client Experience
- Drive Operational Efficiencies
- Deliver Advice with Trusted Analytics
- Grow and Scale the Business

- **Trading and Rebalancing**

Conduct single and bulk trading operations efficiently. The United Managed Accounts framework enables portfolio managers to implement sophisticated investment strategies in a streamlined and cost-effective manner. Rebalance portfolios using intuitive workflows and execute your trades efficiently via FIX protocols.

- **Model Management**

Manage model portfolios and blended benchmarks in a centralized location. Create and share your models with other users and seamlessly integrate them within your trading and reporting workflows.

- **Portfolio Compliance**

Track portfolio allocation and risk breaches in real-time. Make d1g1t the investment book of record.

- **Document Management**

Centralize vital documents in a secure vault. Seamlessly publish documents to your client portal and mobile apps.

- **Billing**

Simplify the calculation of management fees using a powerful multi-currency fee engine that supports complex schedules and payment terms.

## Drive Operational Excellence & Scale

Used by everyone across the firm to digitally manage the business, portfolios and clients, d1g1t enhances operational efficiency and productivity. The platform's modern and modular architecture is designed for speed and scalability and the open APIs provide ease of integration. Allowing advisory firms to connect easily to other systems, scale up operations, and activate new modules with minimal effort.

## Powerful Analytics Boost Differentiated Client Experience

d1g1t provides a comprehensive view across all portfolios covering clients' full investment portfolios including complex household structure, traditional, alternatives, derivatives, private equity and off-book assets, for a view of complete net worth. The platform also covers integrated performance, exposures and risk through the wealth cycle including scenario analysis, goals-based analytics, compliance, and trading.

*"Our team conducted an exhaustive search and due diligence process to evaluate multiple wealth management technology solutions. We were most impressed with the capabilities of the d1g1t platform along with the depth, expertise, and experience of their financial engineering team."*

- Ted Neild, Partner, CEO & Chief Investment Officer,  
Gresham Partners

The platform is available in English and French. For more information on the d1g1t wealth management platform, email us at [getintouch@d1g1t.com](mailto:getintouch@d1g1t.com).

## About d1g1t

d1g1t is a leading wealth management technology provider that helps RIAs, Multi-family offices, Broker Dealers, Custodians, and Bank Advisor Networks transition to a digital business model. Our award-winning Enterprise Wealth Management Platform is designed to transform the patchwork of legacy systems with an integrated platform that drives scale and operational efficiencies across the organization. Powered by an institutional-grade performance and risk engine, d1g1t provides on-demand

analytics consistently used across integrated workflows for reporting, billing, trading, compliance, and client engagement activities. d1g1t provides advisors and their clients with the best digital experience available in the market, enabling firms to elevate the quality of their advice and demonstrate its value to clients.

Learn more at [www.d1g1t.com](http://www.d1g1t.com).

