## PROSPECTING CLIENTS

# Financial planning that boosts client acquisition by providing support until they sign onto investment proposals

- **Produces a client acquisition portal** that is independently customised for your entity.
- **Facilitates communication with your prospective clients** and acquisition of their data to manage their business.
- **Performs financial simulations** in various scenarios that are adapted for each client.
- Uses Openfinance solutions to support **investment proposals**.

## Functions of the solution

### PROVIDES A LANDING PAGE

Where potential clients can generate the financial planning required to meet their personal targets.

### ALLOWS FOR ASSESSMENT OF THEORETICAL PROJECTION

Of the plans generated in pessimistic, neutral and optimistic scenarios, which helps align client expectations from the start and boosts confidence in the entity's services.

### ADAPTS THE FINANCIAL PLANNING GENERATED TO EACH CLIENT

It is possible to adjust all the variables needed to configure each client's investment plans, from their risk profile, initial capital, monthly saving capacity and target capital to the investment period.

### ALL PROJECTIONS AND CALCULATIONS CARRIED OUT CONSIDER THE IMPACT OF INFLATION COSTS

This prevents client targets from being compromised.

### THE SOLUTION TARGETS EVERY TYPE OF CLIENT

It uses interactive visual and graphic representations to facilitate comprehension and be self-explanatory.

### ALLOWS DIRECT CONTACT WITH ADVISORS

In order to offer customised advice based on the client's indicated preferences.

Openfinance Ecosystem

## Advantages for business

**1** **Automatic and customised creation of key landing pages** to capture the business of prospective clients.

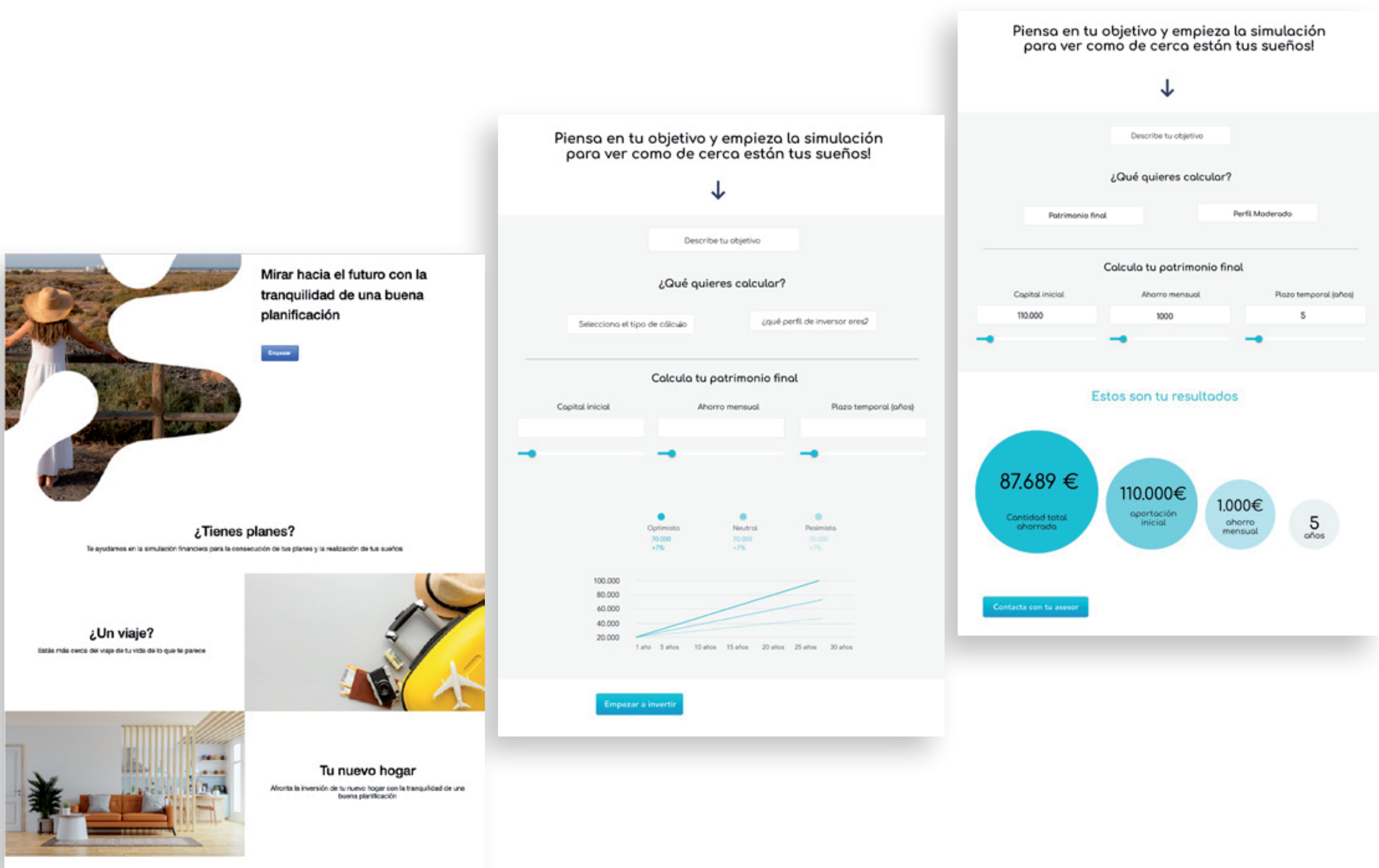
**2** It allows clients to **experiment with different variables** when configuring their investment plan and assessing the scenarios that best suit their needs.

**3** It offers your prospective clients a **versatile and powerful tool to customise their personal targets** and to later tailor the action plan to achieve them with the help of an advisor.

**4** It gives the advisor **greater knowledge of the preferences** of potential clients, personal goals and of their behaviour.

**5** It improves **business conversion** by supporting your clients until they sign onto investment proposals.

## Our solution

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