

# Financial Advisors

Technology solutions from Movel enable financial advisors to respond rapidly to new opportunities.

New innovative technologies and solutions from Movel deliver greater value by enabling better business insight to financial advisors. Win new clients, connect better with existing clients, increase referrals by using mobile and web technology from Movel. In addition to on-premise implementations, deploy business processes quickly and flexibly in the cloud.

## How does Movel technology help financial advisors?

### Increase customer referrals



Mobile technology from Movel helps clients send and financial advisors to receive referrals easy and conveniently.

### Gain new revenue



Increase revenue with technology solutions from Movel, by helping customers move more assets under management.

### Differentiate your brand



Use technology as differentiator to gain market share to beat the competition. Being tech-savvy means more business.

### Remain top of mind



Use the convenience of mobile technology to communicate with customers and always remain on top of their mind.

### Improve your credibility



Build credibility with clients and prospects. Capture a younger generation of new clients and tech-savvy investors.

### Discover new demographics



Get ready for new opportunities and market discoveries with a tech-savvy, socially-aware Millennial generation.

## What are the benefits?

- ★ Establish and maintain high-touch relationships with clients and prospects
- ★ Increase the number and quality of referrals
- ★ Improve operations and collaborative processes for tracking client satisfaction
- ★ Gain capabilities and business intelligence, to help identify new opportunities

## Why Movel?

Movel is uniquely positioned to help financial advisors gain competitive advantage and reduce operational costs by building modern, performant and secure financial web and mobile applications. Our enterprise apps run on cost-effective public or private cloud infrastructure, and are secured by the industry's top encryption and data protection standards.

## Key facts

**62%** More referrals

When customers use mobile technology, they are more inclined to make a referral.

**35%** Less IT budgets

Compared to traditional solutions, Movel's enterprise financial products require less investment upfront and smaller ongoing maintenance.

## Success Stories

- ★ SAM Phinancial
- ★ The CA
- ★ SurveySnap
- ★ eKare
- ★ Axon Ghost Sentinel
- ★ Opulenc

## Learn more

- ★ Insights from Movel
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- ★ Presentations
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