



PRIVATE BANKING SERVICES

CASE STUDY - [PRIVATE BANKING SERVICES \(HTTP://PATPATIA.SOURCE TOP.COM/WP-CONTENT/UPLOADS/2014/06/PRIVATE_BANKING_SERVICES-1-3-2014.PDF\)](http://patpatia.sourcetop.com/wp-content/uploads/2014/06/Private_Banking_Services-1-3-2014.pdf)

The Challenge

A diversified, national bank engaged Patpatia & Associates to build a unified wealth management platform across multiple channels including private banking, licensed bankers, retail brokerage, and direct distribution.

Patpatia & Associates' Activities

- Client segmentation and needs analysis for customer-focused solutions with tailored product set, pricing, and service models
- Creation of client-centric investment services offerings with integrated design of cross-selling opportunities & incentive strategies
- Development of actionable investment workflow to institutionalize “mass-customized” advice & model-based management
- Definition of functional and technical needs based upon business objectives and vision for platform integration
- Integration of fundamental business architecture with legacy systems, current 3rd party toolsets, and prospective vendor development
- Reengineering of business process flows, identifying inefficiencies in day-to-day advisor, middle, & back-office activities for automation and/or revision

The Results

We delivered our client a strategic business plan and assisted in implementation of an integrated wealth management platform and advisory solution. This resulted in a unified source for wealth management offerings across all proprietary channels with focused solutions for each client segment.