

Enhance client and advisor interactions through personalized wealth and asset management services.

For custodians, financial advisors, brokerages and financial institutions, integrating wealth management systems with other platforms ensures that varying data sets are unified. This provides more powerful ways to access and analyze accountholder information and build additional revenue streams from existing customers with deeper insights into their wealth needs and by offering more investing products through fintech integration.

Utilize data to offer personalized wealth and asset management services

Maximize the potential of account holder data to unlock valuable insights, facilitating the delivery of personalized advice that builds trust and nurtures lasting client relationships.

Tailored Solutions: Streamline access to a wealth of data from diverse sources within wealth management platforms to meet the unique needs of various client segments, including business owners, trusts, and high-net-worth individuals.

Digital Transformation: Respond to evolving client expectations by embracing digital transformation. Through the integration of advanced technology stacks powered by APIs, financial service providers can innovate and customize the client experience to stay ahead in the digital age.

Data Integration: Sandbox Banking is your trusted partner in digital transformation, offering Glyue™, our Integration Platform as a Service (iPaaS). Glyue™ seamlessly connects core banking platforms with a wide range of lending, deposit, KYC/AML, data, cards, underwriting, mobile banking, and analytics solutions from leading providers.

Enhanced Client Offerings: Empower account holders to effortlessly transfer funds into your wealth platform and open new accounts seamlessly, enriching your suite of client offerings.

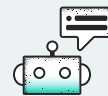
Integrating wealth management strengthens business



Personalized offerings— Efficiently access and analyze diverse data from various sources within wealth management platforms. Cater to the distinct requirements of clientele such as business owners, trusts, as well high-net-worth individuals.



Build non-interest revenue— Many wealth management companies represent non-interest income for the bank holding company.



Automate advisory services— Use data such as a users' risk aversion profile, age and income to create investment options via robo-advisors.

How Glyue™ benefits your wealth management platform



Multi-system integration—Seamlessly integrate portfolio management data with core banking systems and other software platforms for enhanced efficiency.



Enhanced accountholder experience—Personalize wealth planning solutions for customers or members, fostering stronger connections and satisfaction.



Advisor empowerment—Equip wealth advisors with precise, up-to-date data to enhance their ability to deliver personalized, human-centric experiences.



Business Agility—Stay adaptable to evolving consumer demands by ensuring your business processes are agile and responsive.



Improved Portfolio Management—Offer users and portfolio managers an organized, real-time platform for better portfolio management and decision-making.

**Tell us about your Wealth Management business and platform,
and we'll provide a plan to amplify your business.**

Want to know more?

 [Let's talk!](#)

 [View our full integration ecosystem](#)

 [See which cores we integrate with](#)