e-AMIS Mobile Client

The customer relationship management (CRM) module integrated into e-AMIS includes many different functions for the administration, profiling and risk classification of clients, as well as for document management. The Mobile Client enhances this offering and allows investors direct web-based access to information on holdings, as well as safe online communication with the asset manager servicing their portfolios in e-AMIS. Advisors are able to call up their customers' portfolios and display the current investment situation on any mobile device.

DIRECT ACCESS

The overview of portfolio positions is displayed via a web-based front end. The sophisticated authorisation concept ensures that investors are only able to access the position data that they are authorised to. The asset structure can be analysed for individual portfolios or consolidated across several portfolios according to dynamically configurable criteria – right down to the level of positions, including all movements.

On top of that, all current portfolio valuations, along with performance and risk indicators, can be displayed in the form of prepared reports. Another attractive feature for asset managers is the automated generation of periodic reporting for a large number of customers, which can be viewed by each investor via the Mobile Client immediately after the reports have been created.

In addition to online analyses and reports, a selection of product information and other documents can be displayed via the Mobile Client. Furthermore, investors can modify their profile, address and contact data in e-AMIS (customer self-service).

SECURE COMMUNICATION

From a technical viewpoint, access to all investment information is possible from any mobile device via a web browser. Communication is encrypted using transport layer security or a secure sockets layer. The secure authentication process is based on a two-factor authentication using a time-based one-time password algorithm standard. In order to generate the token, an app can be installed on mobile devices that supports this standard (e.g. Google Authenticator), so there is no need to use a token-generating device or to keep a cross-off list. The Message function in the Mobile Client assures a secure connection for exchanging confidential information between investors and asset managers.

MOBILE DEVICES

The application is designed for mobile devices (tablets, smartphones). The screen format automatically adapts to the end device (responsive design). The asset manager's contact information is automatically furnished with hyperlinks (integration of phone and e-mail) and their location shown in Google Maps as soon as the address and contact data are stored in the e-AMIS database. The investor will then automatically see the details of the the customer relations entity assigned to him.

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CONCLUSION

The Mobile Client is another useful customer relationship feature in e-AMIS. Investors can directly view information on their investments and communicate with their asset manager quickly and securely. The Mobile Client is an attractive tool for asset managers that enhances their service offering for investors.

e-AMIS – LEADING WEALTH MANAGEMENT SYSTEM

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