

EFFICIENT AND HOLISTIC WEALTH PLANNING ADVISORY

WEALTHPLAN IS AN ESSENTIAL TOOL IN ADVISING THE PRIVATE BANKING CUSTOMERS

“WealthPlan is a significant part of our full-scale advisory services for the Private Banking customers of Handelsbanken. It provides the Private Banking advisor with an overall overview of the advisory competences to be involved and it gives the customer a good basis to make the right decisions.”

Carsten Højegaard, Head of Handelsbanken Private Banking

Handelsbanken

#KEY TO CAPABILITY

Obex

MODULAR PLATFORM FOR HOLISTIC FINANCIAL PLANNING

 Keylane

Handelsbanken can now implement a comprehensive advice service and ensure a holistic view of the customer's combined economy.

CHALLENGE

Handelsbanken Private Banking offers a comprehensive wealth advisory and investment management concept for wealthy clients with complex financial conditions. Handelsbanken Private Banking sought to replace its wealth advisory system and the bank chose Keylane WealthPlan.

SOLUTION

Early on, Keylane conducted an assessment of needs in collaboration with Handelsbanken Private Banking and used the results to customise the WealthPlan solution meeting the central requirements for providing holistic advice.

The WealthPlan implementation solution for Handelsbanken Private Banking is tailored to the bank's specific needs and the solution is operated entirely in the bank's own IT environment.

Keylane additionally provided a separate test environment for trying out new components and features which are continually developed for the WealthPlan solution. Handelsbanken's competent wealth advisors also contribute to the ongoing system development by sharing their experiences including ongoing dialogue and sparring.

VALUE

Based on FormuePlan's information about the household's financial situation, including any businesses and companies that are owned in whole or in part, Handelsbanken can now rapidly create a comprehensive financial overview for the customer.

Handelsbanken Private Banking and Keylane work together to develop the solution further with new features, enhanced integration and more automation.

THE WEALTHPLAN SOLUTION ENABLES TO

- Undertake a complete lifetime simulation of the customer's estimated wealth development and consumption options to kick start dialogue regarding financial priorities and use of assets
- Include all the customer's income, consumption, property types, loans, retirement plans, businesses and companies in an overall corporate tax scheme
- Ensure that all calculations are done automatically when the customer data is loaded into the system. This also applies to personal and corporate tax and all relevant public funds
- Implement an effective and comprehensive advice based on a qualified and reliable foundation

EUROPE'S MOST COST-EFFICIENT BANK

Handelsbanken was founded in 1871. Today it is one of the leading banks in the Nordic region and Europe's most cost-effective bank.

Handelsbanken is one of the most solid and profitable banks in the world. Since 1989, when the first customer survey was conducted, we have had the largest group of satisfied customers among the major Nordic banks.

Handelsbanken