Transform Client & Advisor Experiences with Integrated Wealth Data

By aggregating financial data, automating processes, and enhancing reporting, you can deliver enriched digital experiences that empower clients and advisors.

Wealth Access seamlessly integrates with FIS trust accounting and financial planning systems, unifying client and account information into one powerful experience. With a dynamic, consolidated view of all their clients' financial information, advisors gain the actionable insights they need to:

- Provide **data-driven** advice
- **Strengthen** client relationships
- Drive **long-term** financial growth

BENEFITS

Enhanced Reporting

Aggregate trust account data with other assets for a full financial picture.

Premium Digital Experience

Provide a modern, branded client portal with a mobile-first design.

Automated Workflows

Streamline user creation, investor assignments, and batch processing.

Financial Statement Storage

Automatically store and organize documents in the Document Vault.

WEALTH ACCESS

Why Integrate with Wealth Access?

- **Rapid Deployment:** Seamless integration delivers fast, accurate data.
- **Enhanced Tools:** Automated insights & reporting reduce manual work.
- **Superior Experience:** One login for wealth views & real-time access.
- **Efficiency:** Cut manual effort & scale with ease.
- **Competitive Edge:** Digital-first wealth & banking integration.

Supported Integrations

FIS Global Plus

- Settlement date data integration
- Overnight batch processing & near real-time transaction display
- Automated investor and advisor assignment
- Data Supported: Client Information, Related Parties/Advisors, Accounts, Positions, Tax Lots, Transactions, Assets, Statements

FIS AddVantage

- Trade date data integration
- Overnight batch processing
- Automated investor and advisor assignment
- Data Supported: Client Information, Accounts, Positions, Tax Lots, Transactions, Assets, Statements

FIS Charlotte

- Trade date data integration
- Overnight batch processing
- Automated user creation and investor-advisor assignments Data
- Supported: Client Information, Accounts, Positions, Transactions, Assets

FIS TrustDesk

- Trade date data integration
- Overnight batch processing
- Automated financial statement storage
- Data Supported: Accounts, Positions, Tax Lots, Transactions, Assets, Statements

FIS Relius

- Retirement plan data integration
- Overnight batch processing
- Automated investor and account assignment
- Data Supported: Clients, Accounts, Positions, Transactions