

## Case Study: Private Banking Services

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### CHALLENGE

A diversified, national bank engaged Patpatia & Associates to build a unified wealth management platform across multiple channels including private banking, licensed banker, 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 3<sup>rd</sup> 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.