Driving Financial Inclusion with Digital Innovation

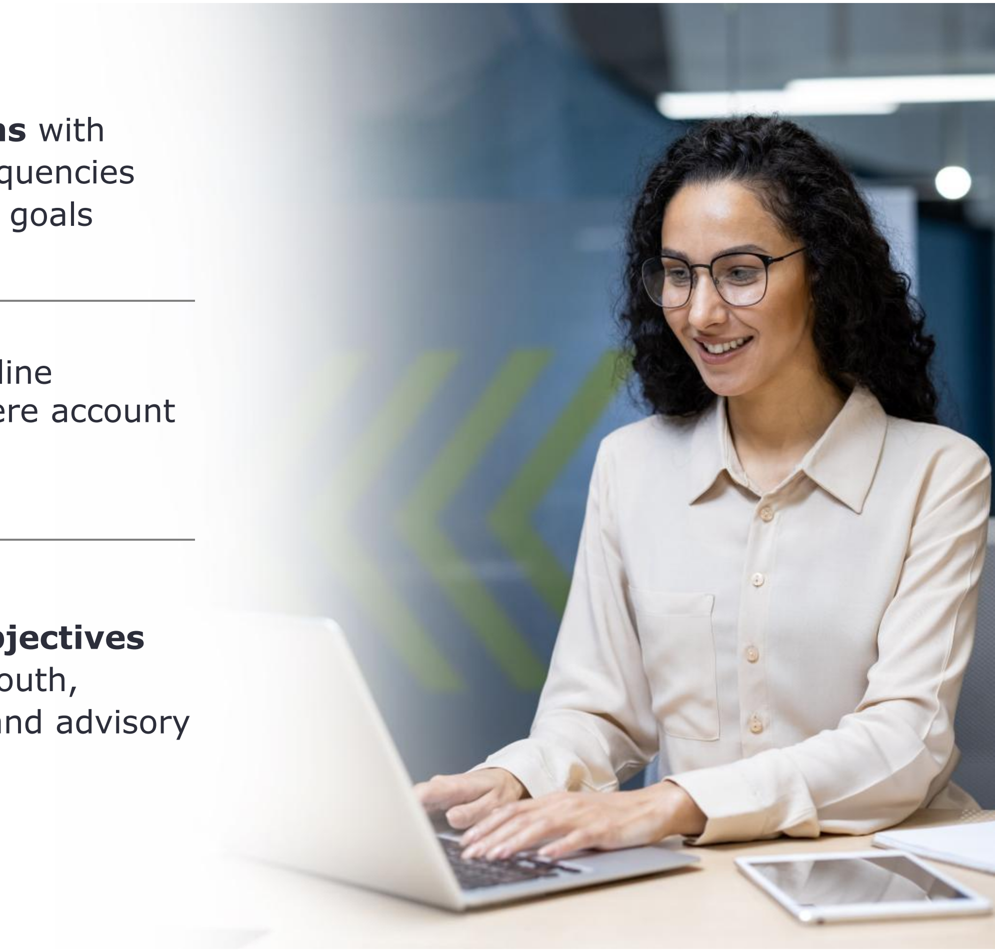
A leading mutual fund company based out of Port of Spain

Enabled flexible, automated investment options and secure digital access to help customers pursue diverse financial goals and build stronger savings habits by leveraging Finacle Core Banking and Wealth Management solutions.

Automated investment plans with customizable amounts and frequencies aligned to customers' financial goals

Secure digital access via online platforms for anytime, anywhere account management

Serving diverse financial objectives with specialized products for youth, education, entrepreneurship, and advisory services



One of the largest financial institutions in Trinidad and Tobago implemented a digital solution to empower its RMs

A state-owned financial institution, founded in 1982 and headquartered in Port of Spain, Trinidad and Tobago. It is one of the largest investment management organizations in the Caribbean, offering mutual funds, wealth management, and investment services to individuals and institutions

Strategic Objectives

- Growing and diverse client base increased demand for personalized, lifecycle-based advisory
- Strong focus on financial advisory, education and wealth creation highlighted the need for consistent, high-quality, and scalable client engagement models
- Multiple investment products, advisory services, and customer touchpoints required a unified, insight-driven advisory platform

Transformational Highlights

- RMs efficiently track and manage their targets and achievements, schedule and record customer appointments, and capture key conversations through dashboard
- The platform is providing real-time portfolio updates, enabling timely insights and stronger client engagement

Business Impact

- Enhancing client engagement & trust guiding customers across financial journeys with expert advisory support
- Scaling advisory delivery across a large and diverse investor base
- Improving product penetration & wealth creation, helping customers make the right investment decisions
- Greater efficiency and convenience through digital enablement and self-service capabilities
- Improving RM productivity to handle a larger client base efficiently

Infosys® Finacle