Navigating the Future: Symphony's Role in Enhancing Security and Collaboration within Wealth Management

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Symphony is an AI-powered communication and technology company fueled by interconnected platforms: messaging, voice, directory and analytics. Our end-to-end encrypted technologies enable over 1,400 institutions to accelerate AI impact, prioritise data security, navigate complex regulatory compliance and optimise business interactions.

What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?

Symphony addresses pressing wealth management challenges. Recently, the firm announced its AI Studio, a framework for deploying AI agents across workflows. Showcased at the Innovate conference in May, the Studio and its Insights platform utilise top-tier infrastructure to ensure security and data ownership without sacrificing compliance. It integrates with Symphony's Confidential Cloud platform, delivering cloud scalability alongside rigorous security previously limited to on-premise solutions.

What role has collaboration – either internally or with external partners – played in your success?

Symphony has dedicated itself to fostering a community built on collaboration and connectivity through close partnerships with its long-term clients and investors. Within the Asian markets, a notable collaboration involves HSBC and its HSBC GPB Chat; by integrating with Symphony Messaging, Global Private Banking clients can securely connect with relationship managers. This integration enables HSBC clients to discuss authenticated trades, receive market updates, and communicate via familiar applications such as WhatsApp from any location.

In describing the results of the initiative, HSBC stated: "We've seen a 230% increase in client onboardings and a commensurate increase in usage of the platform." When asked to comment on how clients find this service and HSBC's capability, "Our clients absolutely love this service."

What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

Modern technology and workflows are advancing rapidly, creating a complex environment of data fragmentation and permanent cybersecurity challenges. This presents unique challenges for firms, particularly in navigating the increasingly complex regulatory landscape and in implementing agentic AI. Coupled with the essential need to share this data through secure, regulated channels, wealth management faces a distinctive set of challenges. Symphony's strategy focuses on anticipating market needs by developing solutions for new and growing challenges in secure communications and workflow collaboration.

How do you cultivate a culture that consistently drives excellence and high performance?

Symphony has been serving global financial markets for 12 years, where innovation in technology and excellence in service are paramount. We believe that Symphony is a place for innovators. We are a collaborative workforce reinforced by strong leadership and a desire to succeed. The diversity of our employees brings creativity and bright ideas to complex problems. Our employees work together effectively and seamlessly, even when faced with challenges, and lean in to solve problems and delight customers internally or externally. We adapt quickly to customer needs with confidence and resiliency. We are where markets connect and collaborate, #WeAreSymphony.

What does winning this award mean to your firm, and how will you use this recognition going forward?

Winning this award is a tremendous honor for Symphony, validating our initial recognition within the wealth management industry. It validates that our products are highly effective in addressing the client communication needs amid an evolving regulatory and technological landscape. Leveraging this award will demonstrate to wealth management leaders that Symphony is a vital solution for firms seeking to communicate with their clients on their preferred channels, without compromising security or compliance.

Winner

- ***Client Communication Solution or Tool***

Private, secure client conversations

Relationship-first communications at the heart of wealth management

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