

# Wealth management, accelerated: How global leaders automate trust at scale

## Client 1

*Global private bank, serving ultra-high-net-worth clients across 60+ countries and territories. Responsible for over \$3 trillion in assets.*

### Personalized service automated at scale

#### Challenge

Ultra-high-net-worth clients demanded 24/7 personalized investment opportunities on mobile channels, but relationship managers were bogged down by 15-minute phone-based risk disclosures.

#### Solution

Deployment of “GPB Chat” using Symphony Messaging and Authenticated Chat, allows clients to receive personalized insights and supports the trade execution workflow via WhatsApp.

#### Result

Achieved a 230% increase in client onboardings over two years and significantly drove revenue through the platform by cutting response times for relationship managers.

## Client 2

*Top-tier global financial services firm, providing critical wealth management, corporate and investment banking services worldwide.*

### Harmonizing global compliance

#### Challenge

Needed to meet strict regulatory standards for their wealth management division while satisfying client demand for convenient mobile messaging apps like WhatsApp and WeChat.

#### Solution

Expanded its use of Symphony Messaging with federation capabilities to enable WhatsApp, providing a compliance-enabling gateway for its wealth management division to interact externally.

#### Result

Successfully integrated WhatsApp for secure recording, enabling relationship managers to engage clients on their preferred channels while managing compliance risk. Next up, the firm plans to roll out WeChat with Symphony Messaging.

## Client 3

*Leading regional investment bank who is a primary gateway for international institutional investors to access Latin America.*

### Bridging the gap from WhatsApp to trade execution

#### Challenge

The trading desk was overwhelmed by manual, unstructured communication and bottlenecks, where advisors had to manually relay every quote between clients and the desk.

#### Solution

Implemented Symphony Messaging to reach clients on WhatsApp, replacing unstructured text with “Smart Cards” and programmable logic that automatically detects regional jurisdictions.

#### Result

Reduced trader error and execution latency by centralizing collaboration in shared rooms where multiple traders can price complex bond and FX requests in real-time.



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