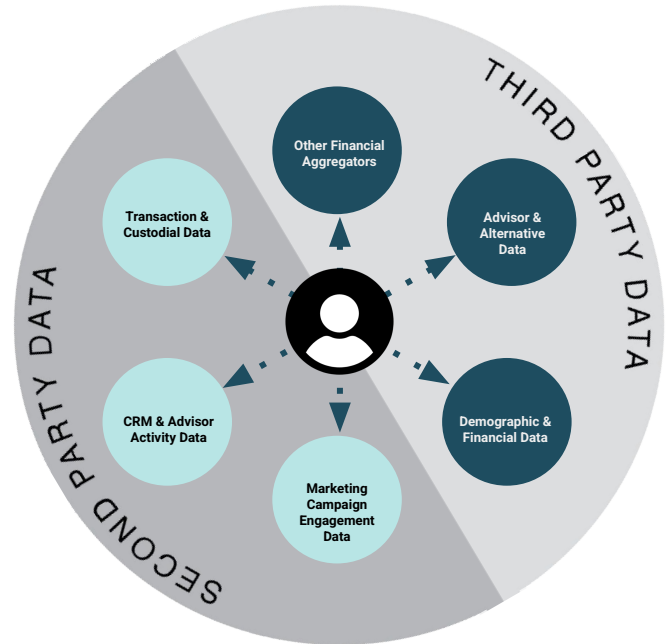## The Data Challenge

Wealth management has lagged in technology adoption, causing significant data management and quality issues. Fragmented and siloed data sets from various vendors and technology stacks complicate planning and reporting. This disjointed environment prevents firms from harnessing valuable insights, impairing decision-making, and hindering growth and efficiency. Without a unified data system, wealth management firms struggle to achieve comprehensive visibility and optimized performance.

The Data Unification Solution

TIFIN AG integrates and cleanses data from multiple sources, creating a single, coherent ecosystem. Unified data is crucial for effective AI-driven insights, as even the best AI models require high-quality data. Key benefits include:

- **Streamlined Data Integration:** Ensures data accuracy, completeness, consistency, and timeliness, providing a robust platform for growth.

- **Actionable and Accurate Insights:** High-quality, enriched data guarantees the success of AI models and generates accurate business insights.

- **Revenue Growth and Improved Efficiency:** Reduces time spent managing disparate data sets, allowing firms to focus on growth and client satisfaction, ultimately driving revenue.

Leaders in technology adoption and innovation made up the top 10% and laggards the bottom 25%—and the leaders are growing revenues at 5X the laggards *

*Accenture 2024

How It Works: TIFIN AG seamlessly unifies your data using a comprehensive data unification process from data input to actionable insights. The process includes:

- **Data Ingestion**: We collect and store data from your systems of record, CRM, and third parties into a centralized and secure location.

- **Data Quality**: We enhance data quality by removing duplicates, correcting errors, and filling in missing values.

- **Data Enrichment**: We enrich your data with the latest and most accurate information from our sources and third-party data sets, including contact information, interests, and life events.

- **Data Integration**: We transform and combine cleansed data from various systems, providing a coherent structure that reflects your business processes.

- **Data Security & Privacy**: We ensure data security and privacy with encryption both "in transit" and "at rest."

Once the data is unified, it's ready for your own business analytics, marketing automation, and our advanced AI and ML models.

For more information about partnering with TIFIN AG, email us at ag@tifinag.com.