

Experience great productivity in **MF Form** filling with Wealth Magic's new module

MAGIC FORMS

**COMMON
APPLICATION**

**SIP
REGISTRATION**

**NACH
MANDATE**

**KYC
REGISTRATION**

FATCA

Here are some of the key features of Magic Forms :

- Express Form Filling Fill a form in less than a minute
- Exhaustive Form Filling Almost all necessary fields are filled by Magic Forms thereby Eliminating / minimizing the need to input anything with pen
- Smart Form Filling Magic Forms has a smart logic to automatically fill the forms that you need. You don't need to select any forms yourself. One input to create multiple forms such as Common Application, SIP Registration, NACH Mandate, FATCA and KYC
- Multiple Forms in Single E-Mail For e.g. if customer wants to invest Rs. 10 lacs in 5 different schemes and different holding patterns, Magic Forms can assist you in creating all forms in one go and e-mail to customer with all attachments in single mail
- Editable Forms sent to customer Forms sent to the customer can be kept editable. So when the customer reviews, he can make minor changes and hence you don't need to send the forms again

OTHER HIGHLIGHTS

- | | |
|---|--|
| ➔ Manage Life & Non-Life Insurance Business Across All Life Insurance Companies | ➔ AUM Drill Down |
| ➔ Import Policy Data from Excel / VMPro | ➔ Advanced Claim Management & Tracking System |
| ➔ Seamless experience of Buying, Redemption & Switching on BSE & NSE Platforms | ➔ Customized Home Page |
| ➔ Online Transactions Facility available on Web & Mobile APP | ➔ Financial Planning Solutions |
| ➔ Exclusive Prospecting Technique | ➔ Customized Greetings |
| ➔ Asset Allocation Based of Risk Profile | ➔ Seamless Integration with Your Website |
| ➔ Online Access of Portfolio | ➔ Automated scheduling of Customer Services |
| ➔ Premium Quotation of Health & Motor | ➔ Auto Import of Data from CAMS, KARVY, SUNDRAM & FRANKLIN |
| ➔ Pre-Filled MF Forms | ➔ Data Import Option from Principal Brokers* |
| ➔ Business Analysis – All Asset Class | ➔ SIP / SWP / STP / CWP Transactions Management |
| ➔ Paperless Office | ➔ Up-Front & Trail Commission Management |
| ➔ Integrated View of Customer Portfolio | ➔ AUM Reconciliation |
| ➔ Claim Management – Health & Motor | ➔ Business Comparison Reports |

ACT NOW!

Adopt Wealth Magic and accelerate your business growth

SEND SMS - with below instruction

DWT<space>WMDEMO<space>CITY TO 9902099020
or visit: www.wealthmagic.in