Wealth Magic

powered by DATACOMP Web Technologies (I) Pvt. Ltd.

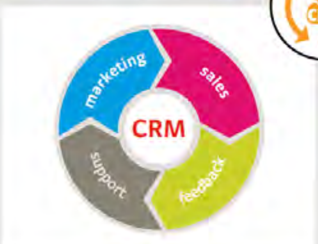
Wealth Magic is a single platform which can help you drive your business across all

Asset Classes

In today's fast paced life, your customers want information on the move. Do you struggle to service multiple customer enquiries for information access.

No worries, WealthMagic can help you provide information to your customers in real time, on the go.

Transform from IFA to a Distributor
Build a Network of Sub-Brokers and scale new heights in your business



Track Customer Service with Advanced CRM System
Use Advance CRM tools to track all service requests and ensure timely action

Online MF Transactions
In Digital World, give online shopping experience to your customers

Powerful Goal Based Planning
Deliver highest level of investment satisfaction to your customers by using our Goal based financial plans

Anytime, Anywhere Access on Mobile
Keep a track on Business on the move through Comprehensive Mobile App for IFAs

MY WEALTH
A Mobile Application that provides your investors the key information & Updates at their fingertips

Magic Forms
Create Professional MF Application Forms At Super Lightning Speed

DATACOMP Web Technologies (I) Pvt. Ltd.

Innovation · Trust · Commitment 30 years 1985 - 2015

For details visit www.wealthmagic.in or Give a missed call on : 8010-173-007

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Create effective Sales Presentations in seconds

Datacomp has a proven track record of creating high impact creating sales illustrations that has helped thousands of financial professionals close big ticket business with their customers. Datacomp has created the **PRODUCT MIX** stories which are helpful in closging the big ticket business for IFAs. These stories are based on the **COMBINATION OF INSURANCE & MF, viz Ultra Retire, Ultra Tarang and Ultra Child Secure.**

Close your sales faster with creating personalized sales illustrations and goal based wealth creation plans. The sales presentations are based on stories created to meet the need of the customer.

Our revolutionary Sales illustrations are created with goal based sales pitches such as

Child Career Planning

Retirement Income Planning

Wealth Creation

WealthMagic's powerful CRM Centre will keep you in control of entire information of your customer from one single page. From the CRM Centre page you can do the following:

- View the entire portfolio of the customer – from summary to detailed information about every transaction of the customer
- Add / Edit / View / Manage customer details
- View / Manage all documents of the customer
- View all upcoming portfolio events of the customer
- View / Create sales presentations / Quotations for the customer
- Manage all correspondence with the customer
- Place online MF orders for the customer
- Manage Tasks & Service requests
- Create / Edit / Review Financial Plans created for the customer

Online Transaction - Buy /Redeem/ Switch

- Seamless experience of Buying, Redemption & Switching on BSE & NSE Platforms
- Online Transactions Facility available on Web & Mobile APP
- Supports Multiple ARNs
- No Registration is required with AMC's
- Distributor Initiated Transactions (DIT)

Powerful Goal Based Planning

- Option of Creating Customized Goal
- Asset Allocation Based of Risk Profile
- Create Your own Model Portfolio
- Recommendation on the basis of Model Portfolio
- Mapping of MF portfolio to the Goals
- Get Alerts on Review Date
- Review Goals Professionally with Advanced Goal Review System

Manage Business Across All Asset Classes

- Auto Import of Data from CAMS, KARVY, SUNDRAM & FRANKLIN
- Data Import Option from Principal Brokers like NJ, Prudent etc.
- SIP / SWP / STP / CWP Transactions Management
- Up-Front & Trail Commission Management
- Manage Life Insurance Business Across All Life Insurance Companies
- Import Policy Data from Excel / VMPro
- Premium Quotation - Motor & Health
- Auto-calculated Renewal Premiums
- Check the Eligibility for Free Health Check-up
- Check eligibility for Pre-Existing Diseases Cover

MY WEALTH A Mobile Application that provides your investors the key information & Updates at their fingertips

- 24 X 7 Access to Wealth Portfolio – All Asset Classes
- Detailed drill down to transaction level
- Multiple views of his MF portfolio – Gain-Loss / Folio Ledger / Capital Gains / Active SIPs / Asset Allocation, etc.
- Online MF Transactions - Investor can Buy, Redeem & Switch directly from his mobile
- Alerts for upcoming events like SIP due, FMP Maturity, Premium due, GI Renewals, etc.
- E-Docs - Investors can have access to all important documents
- Investors can initiate service request for variety of services from the distributor
- Push Notification to enable you to communicate effectively with your investors
- Tools & Calculators to help him plan his investments

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

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