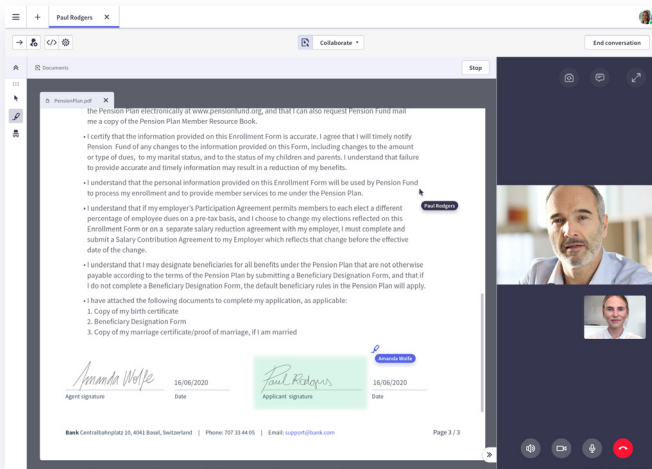




UNBLU FOR PRIVATE BANKING & WEALTH

Digital Is More Than Just Online Face-to-Face Meetings

The right secure digital engagement & collaboration solution increases the number of client meetings, increases the cost-effectiveness of advisors, and helps you close business!



Advisors use Unblu’s Conversational Platform to host effective online client meetings that facilitate the building of loyal and meaningful relationships.

Personal Communication

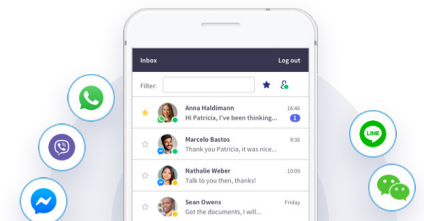
Build trust by providing a personal in-person experience with video and voice calls.

Real-time Collaboration

Share documentation and work together to guide clients to the conclusion of a business transaction with co-browsing, screen-sharing, and document co-browsing.

Ongoing Conversations

Don’t constrain your client touchpoints to just online meetings. Keep the conversation going and be there for your client with the convenience of secure text messaging.



Unblu’s cloud deployment means you can react quickly and promptly start hosting effective client meetings.



Other Benefits of Unblu

Optimize Acquisition Campaigns

- Reduce drop-off
- Engage at the right moment
- Convert more

Customer Support

- Increase customer satisfaction
- Resolve issues faster
- Improve efficiency

Automation & AI

- Integrate best-of-breed bots
- Automate simple tasks
- Allow advisors to focus on revenue opportunities

Request a personalized demo or more information on our express package for Brokers by contacting us at info@unblu.com or visit www.unblu.com