

MULTI-LOB

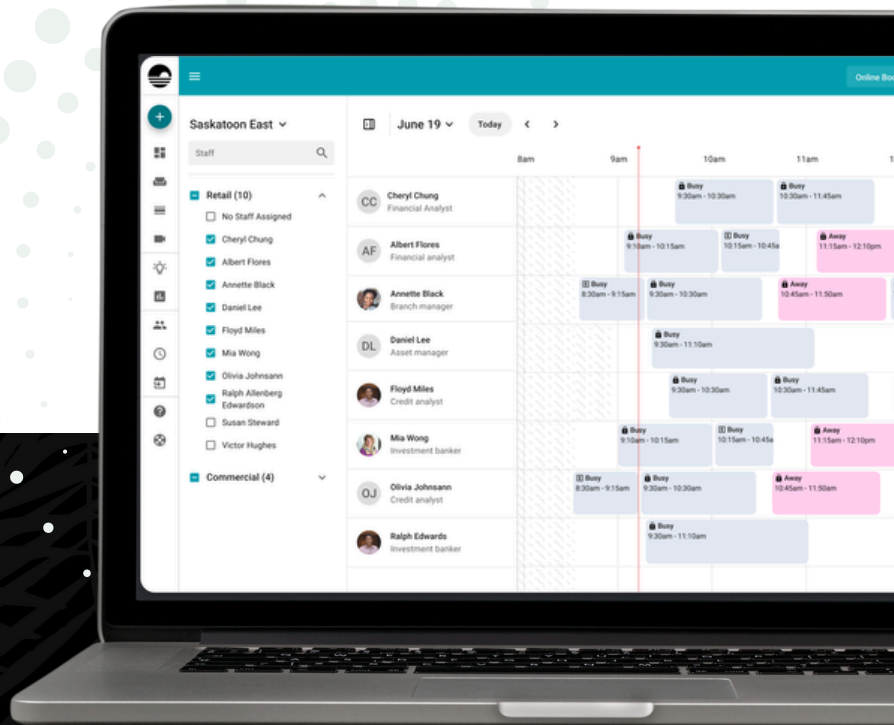
# One platform.

# Every line of business.

Multi-LOB gives banks a scalable foundation for growth. It enables your organization to capture client engagements across every business unit in a single system, creating a reliable source of truth for every client relationship.

With a unified view of the client, banks can grow wallet share across business units such as Wealth and Lending without reimplementation, compliance risk, or fragmented client experiences.

Operate as one bank and **accelerate growth across every line of business**



## Business Impact of Multi-LOB

- Higher referral conversion
- Increased wallet share
- Reduced administrative overhead
- Faster time to value for new lines of businesses

## Operate as One Bank

**Configurable Data Segregation:** Run multiple lines of business through a single instance while maintaining strict data separation and giving clients a consistent experience.

**Shared Client Profiles:** Track client engagements across every business unit in one system, giving advisors the context they need to deliver more relevant, effective conversations.

## Simplify Administration

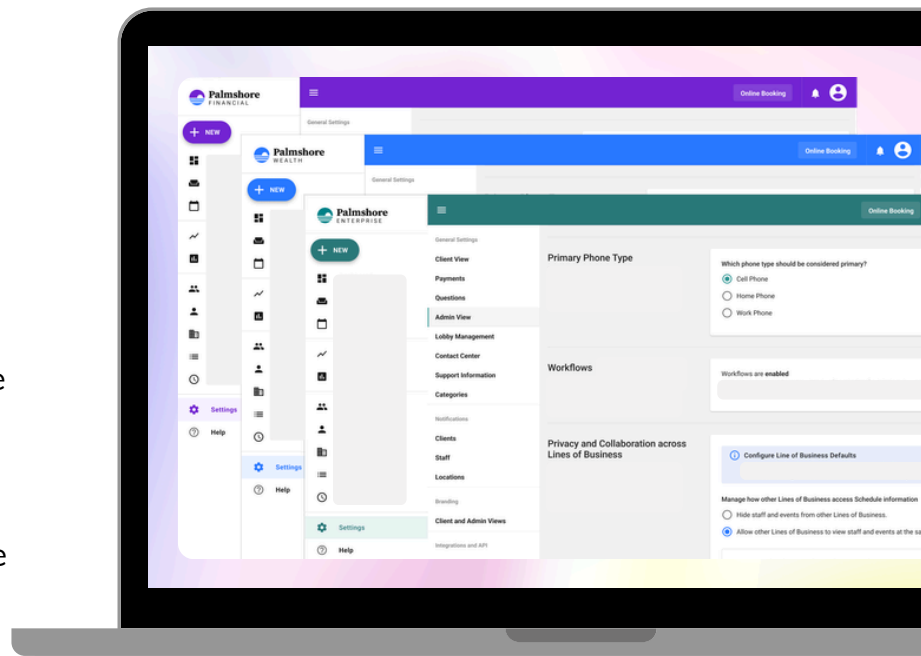
**Enterprise Reporting:** Give leaders a real-time, institution-wide view of performance without stitching together reports.

**Centralized Control:** Replace multiple instances with a single enterprise instance to reduce IT overhead and enforce consistent controls.

## Accelerate Referrals

**Cross-Department Booking:** Turn internal hand-offs into booked meetings by allowing staff to schedule appointments across departments instantly, without follow-ups or friction.

**Joint Advisor Meetings:** Book advisors from different lines of business into the same meeting, elevating the level of personalization.



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**See how your bank can scale without adding complexity.**

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