

# Modern Client Intelligence for AUM Growth

Leverage unified, real-time data to identify risk, protect assets, and expand wallet share

Client and mandate data is siloed across CRM and accounting systems, limiting visibility into wallet share, mandate risk, and profitability. Distribution strategies remain reactive, retention coverage is inconsistent, and leaders can't prioritize high-value relationships effectively.

## What's holding you back

- Client and mandate data fragmented across systems
- Inconsistent AUM and revenue definitions
- Limited visibility into client-level profitability
- Reactive retention coverage
- Manual aggregation for sales and RFP reporting

## What success looks like

- › Improved client retention rates
- › Increased wallet share penetration
- › Reduced mandate loss
- › Higher net positive flows
- › Faster RFP win analysis

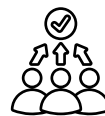
## How evolV helps



**Unifies client + mandate data** with standardized AUM and revenue KPIs across CRM and accounting



**Surfaces executive dashboards** with actionable alerts for mandate risk and flow deterioration



**Aligns distribution and investment teams** around shared client intelligence and growth metrics

## Why evolV?

- **Proven** frameworks for AUM growth and mandate protection
- **Deep** asset management data integration expertise
- **Governance** ensuring consistent definitions across teams
- **Track record** improving retention and wallet share