



Industries / **Finance**

A renowned financial services dealer group

OUR CORE VALUES: PASTA - P = Passion, A = Appreciation, S = Simplicity, T = Trust, A = Accountability

Customer Overview

A renowned financial services dealer group

The client is a financial services dealer group that provides tools and resources to accountants, referral partners, financial advisers and credit representatives for development of lucrative and successful business partnerships.

Client is dedicated to providing highest quality of financial planning advice and credit assistance to people.



Problem Statement

Easy and Organized Management of Information

Client wanted a solution where different stakeholders can easily store and manage data.

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CIS Solution

Seamless Storage and Management of Data

Financial planners can use this application to maintain records and information about their clients in a systematic order. The software can be used to store information about the clients to whom loan has been sanctioned. Admin creates the login information for financial

planner and provides the same to the planner and then the financial planner can add all the client data.

Positive Outcome








The application helps financial advisers to build and maintain strong and profitable business partnerships with their clients and thus grow their business.

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Technologies Used



Our Achievements

 14+ YEARS IN BUSINESS	 05 WORLDWIDE OFFICES	 1000+ EXPERT TEAMS	
 12+ Yr WEB EXPERIENCE	 7+ Yr MOBILE EXPERIENCE	 7+ Yr MARKETING EXPERIENCE	 100+ WORLDWIDE CLIENTS

US/CA:
+1888-572-3991

SINGAPORE
+65-3158-0888

UK/EU:
+44-020-3318-0351

SOUTH AFRICA:
+27-87-550-9535

INDIA:
+91-(731)-6664000

Gain useful insights into your business with our Business Intelligence & Analytics solutions that have a strong backing of our wide-ranging domain expertise and technology skills.

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