

THE POWER OF ONE

LET'S REIMAGINE THE WEALTH MANAGEMENT CLIENT EXPERIENCE.



It's time to reimagine the investor experience. This is ONEsuite.

O'Neil Digital Solutions has a rich history of providing asset managers and investment organizations with the expertise, insight and infrastructure needed to know and understand their customers, effectively communicate with them, and build stronger, sustainable relationships.

Data and intelligence is essential to ensuring meaningful, contextual communications and effective engagement of your investors. With over 700,000 global equities, funds and indices in our proprietary database and 350 major institutional clients around the globe, O'Neil is leading the way in reimaging the investor experience.

O'Neil's ONEsuite platform leverages our 50+ year heritage of turning complex investment data into actionable insights to drive better results. Leveraging next-gen technology and machine learning, the innovative platform provides a comprehensive end-to-end client communication solution to enable digital transformation. With ONEsuite, transform technical disruption and evolving client engagement preferences into opportunities to strengthen relationships and build brand loyalty.



Data Integration, Synthetization + Management

- Advanced Data Security Protocols
- "Off the Shelf" and Custom Integrations
- Data Model Management
- Data Cleanup and Consolidation

Data Analytics + Business Intelligence

- Predictive Modeling
- Next Best Action
- AI + Machine Learning
- Social Determinants Data

Content Creation + Delivery

- Content Creation + Management
- Self-Service or Managed Services
- Document & Asset Vault
- Template Creation & Management
- Workflow Creation & Approval Routing
- Omni-Channel Delivery

Sales + Marketing

- Campaign Builder + Management
- Predictive Modeling + Analytics
- Omni-channel Campaign Orchestration
- Campaign Performance Dashboard
- Machine Learning

Omni-Channel Communications

- Preference Management
- eDelivery & ePresentment
- Print + Fulfillment
- Email, SMS, Microsites & PowerPoints
- Interactive Video
- Production Dashboard