Polaris Digital Wealth Advisor

Overview

Polaris Digital Wealth Advisor is a turnkey digital wealth management solution specifically designed for community and regional banks. The digital platform allows clients to invest for any life event, receive a diversified portfolio, utilize financial planning tools, and access financial advisors from a computer, tablet, or mobile device. Banks with or without a current wealth offering can compliantly offer professional wealth services with little to no upfront cost while receiving an annuitized non-interest revenue stream.

Solution Features

Your clients pay a 0.75% AUM fee and receive the following services regardless of their account size:

- Diversified portfolios
- Access to financial advisors via chat, email, and phone
- Tax efficient portfolio management
- Smart, automated rebalancing
- Online account opening
- Daily performance reporting; portfolio analytics & metrics
- Best in class funds, ETFs, & investment strategies on UMA platform
- Robust financial planning software & tools
- Automated & recurring deposits
- Account aggregation, incl. held away assets
- Low account minimum

Benefits For Your Institution

Polaris Digital Advisor offers numerous revenue, client data collection, and cross selling opportunities.

- Gain non-interest revenue stream
- Identify targeted cross selling opportunities
- Receive holistic & detailed client insights
- Increase share of client wallet
- Provide wealth services to entire client base
- Capture intergenerational transfer of wealth

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About
Polaris Portfolios is a digital wealth management firm that specializes in providing community and regional banks and credit unions with wealth management solutions.