

Empowering Client-Centric Wealth Management: How First Atlantic Private Wealth Elevated Service and Operational Efficiency with d1g1t

THE CHALLENGE:

Seeking a Comprehensive Modern Platform with Excellent Customer Support

In September 2023, First Atlantic Private Wealth deployed d1g1t, an institutional-grade enterprise wealth management platform, to enhance client services and streamline operations. Today they benefit from using the platform for portfolio modeling and management, trading, business monitoring, reporting, document management, compliance, billing, and client communications through the client portal and native mobile app (iOS/Android).

Claire Hunt, Portfolio Manager and Co-Owner of First Atlantic, played a pivotal role in selecting d1g1t. After conducting an exhaustive search of multiple wealth management solutions and drawing from her experience using the platform at another firm, Claire advocated for the implementation of the d1g1t wealth management platform due to its robust investor tools, comprehensive portfolio management features, and advanced trading integration. Switching from another system, Claire and Ryan (President and Co-Owner) found d1g1t's modern interface for both the advisor and client portals, the ability to track mandates directly in the system and direct integration with their trading custodian Fidelity Clearing Canada, as well as the highly responsive support team, appealing.

About First Atlantic Private Wealth:

First Atlantic Private Wealth is a portfolio management firm dedicated to serving clients across Newfoundland and Labrador, Ontario, and Alberta. Established in August 2021 as a sister company to First Atlantic Financial (founded in 1992), the firm builds on a foundation of experience to offer a full spectrum of wealth management services. Their offerings include financial planning, tax and estate planning, retirement planning, risk management, investment management and more. Partnering with custodian Fidelity Clearing Canada, First Atlantic Private Wealth offers a highly secure and efficient platform for portfolio management.

First Atlantic serves a range of clients, including high-net-worth individuals and households. Their approach allows them to cater to both individual and family-based needs, providing tailored investment strategies for households of various levels of wealth.

THE SOLUTION:

Interactive Easy-to-Use Advisor/Client Portal Delivers a Differentiated Client Experience

With the ability to leverage the platform for a range of operational and client-facing services, investors can now directly access their portfolio through the First Atlantic branded client portal and mobile application to track the performance, exposure, and risk of their investments, right down to the family member level and to access and/or upload documents. The two-way document sharing allows clients to upload documents to the portal.

“ I’m loving the system. The engagement has been incredibly well-structured— stages of the process, clear communication, and a white-glove experience made us feel that we were in good hands and that the team knew exactly what they were doing. Also, the household hierarchy makes it easy for us to view the holdings of an entire household, drill down to view specific household members and provide family members with their own unique, personalized view. The flexibility of the platform and the fast calculation engine enables us and our clients to view and execute “what if” scenarios and analysis in real-time. ”



Claire Hunt,
Portfolio Manager and Co-Owner,
First Atlantic Private Wealth

OUTCOMES:

Bolsters Operational Efficiencies & Delivers an Elevated Client Experience

Since integrating the d1g1t enterprise wealth management platform, First Atlantic Private Wealth has experienced significant operational and client-focused benefits, including:

Enhanced Client Experience:

The d1g1t platform provides clients with a higher level of transparency and flexibility to their accounts through an intuitive, interactive mobile app and client portal. First Atlantic advisors can now offer clients a seamless, transparent view of their portfolios, with easy 24/7 access to investment summaries and updates. The client experience benefits from the platform's modern interface, which is popular among both advisors and investors.

Streamlined Operations:

The d1g1t platform has helped First Atlantic simplify portfolio management, reporting, compliance, billing, and document management, all from a single platform. The ability to track and report on key business metrics from a centralized interface saves time, improves accuracy, and enhances regulatory compliance. With the powerful institutional-grade analytics and risk engine, the real-time computing, and the platform's flexibility, First Atlantic can produce reports at speed, reducing the time spent on manual workflows and resulting in a differentiated client experience.

Advisory Efficiency:

First Atlantic is empowered to guide clients directly through their financial journey using interactive portal widgets, giving clients a clearer understanding of their portfolio and investment decisions. Tracking mandates and executing trades through Fidelity has also become more efficient, allowing less time on administration and more time providing strategic investment advice.



Looking at the solution from a technical lens, I appreciate that d1g1t is an API-first platform, enabling smoother integration across our tools including the integration with FIX for equities and mutual fund trading through a direct file transfer with Fidelity Clearing Canada, and allowing for more customization in how we serve clients. The platform has enabled us to elevate the client digital experience and optimize operational efficiencies.



Ryan Hunt,
President and Co-Owner,
First Atlantic Private Wealth

IN SUMMARY:

With d1g1t, First Atlantic Private Wealth has enhanced client satisfaction. d1g1t provides the firm with a cutting-edge platform that enables them to be highly responsive to clients and elevates the client experience. First Atlantic provides a high level of personal engagement, while the platform's modern tools simplify daily operations and allow for a more comprehensive overview of client portfolios.

First Atlantic Private Wealth's journey with d1g1t is a testament to the power of modernizing wealth management to meet the evolving demands of high-net-worth and ultra-high-net-worth clients.



To learn more about the d1g1t enterprise
wealth management platform visit

www.d1g1t.com