

Assess the Financial Health of Your Customers



WealthCare

Housekeeping

- Listen-only mode for attendees
- Use Q&A feature to submit your questions
- Questions will be visible to all attendees, but there is an option to submit anonymously
- Presentation recording will be available on our website at environicsanalytics.com/resources/webinars

Today's Presenter

Vito De Filippis

Director, Business Development
Financial Services Industry





WealthCare



**A DATA-DRIVEN SOLUTION TO MEASURE THE
FINANCIAL WELLNESS OF YOUR CUSTOMERS**

Today's Presentation

- Why we built WealthCare?
- What is WealthCare?
- How can your organization leverage WealthCare?

Canada's Financial Industry

CANADIANS SEE MONEY
AS THEIR
GREATEST STRESS



CANADIANS HAVE
MULTIPLE FI
RELATIONSHIPS



OPEN BANKING
IS COMING



Financial Stress Does Not Discriminate



What We are Hearing



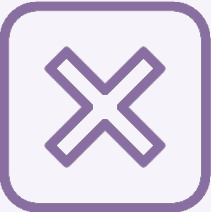
Challenges in Addressing Financial Wellness



Limited view of a customer's relationship



Hard to assess and measure



Challenging to action

What is WealthCare?

WealthCare



Indicator of financial wellness
of all Canadians



Actionable at the 6-digit postal code



By lifestage and age



8 months in development



Over 100 variables from 10 different sources

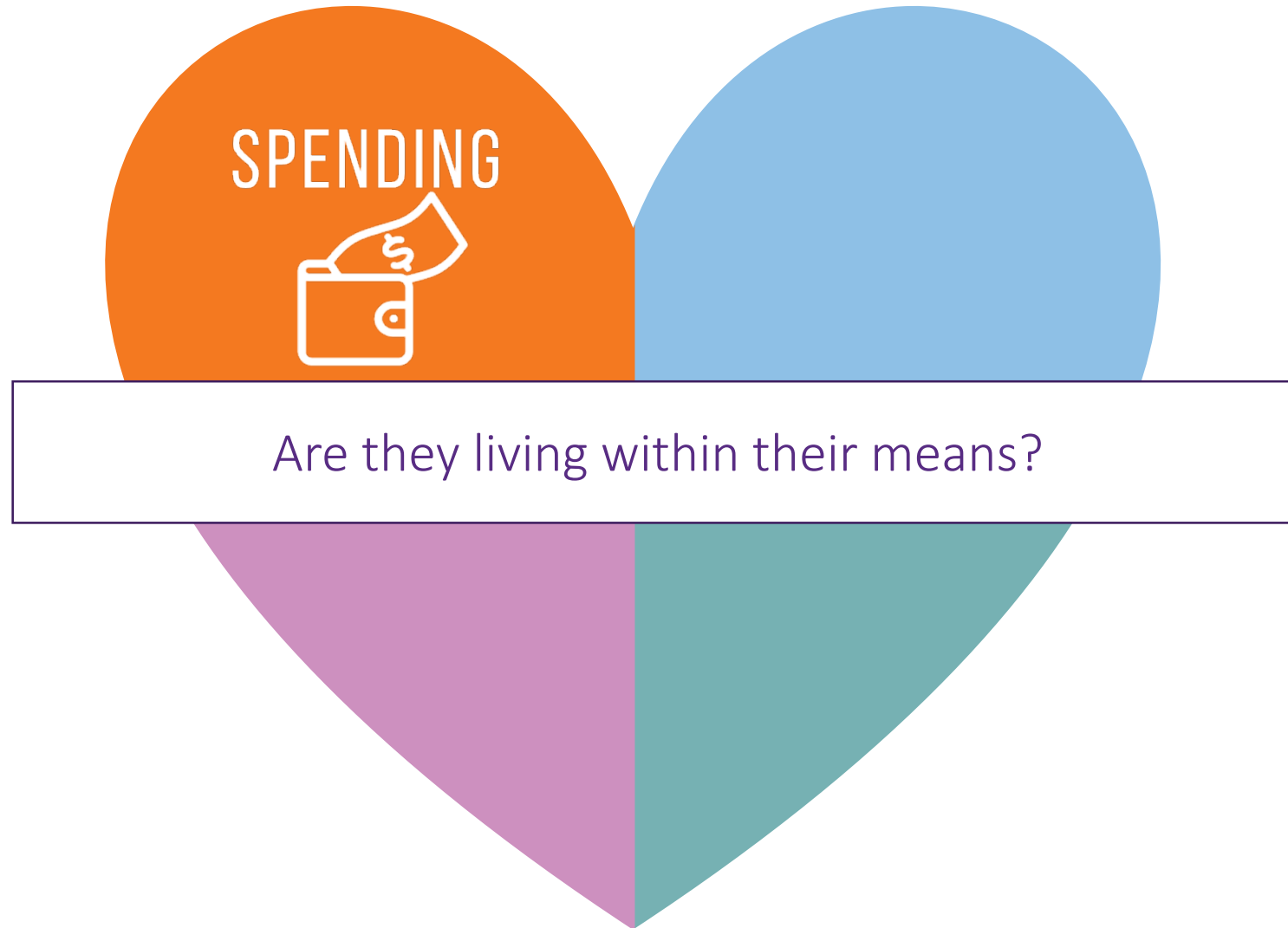


Includes wealth, attitudes and behaviours

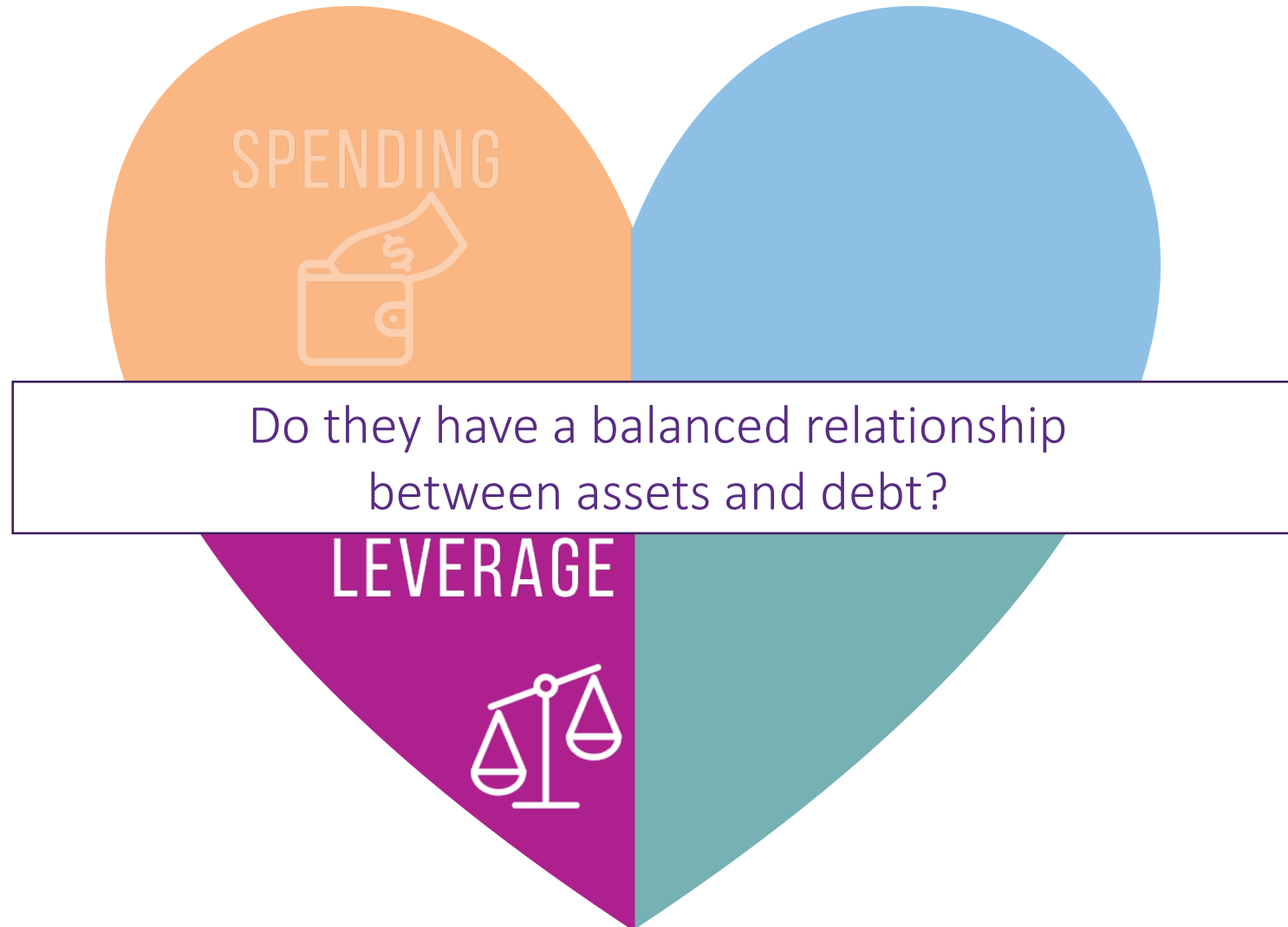
WealthCare's Four Key Pillars



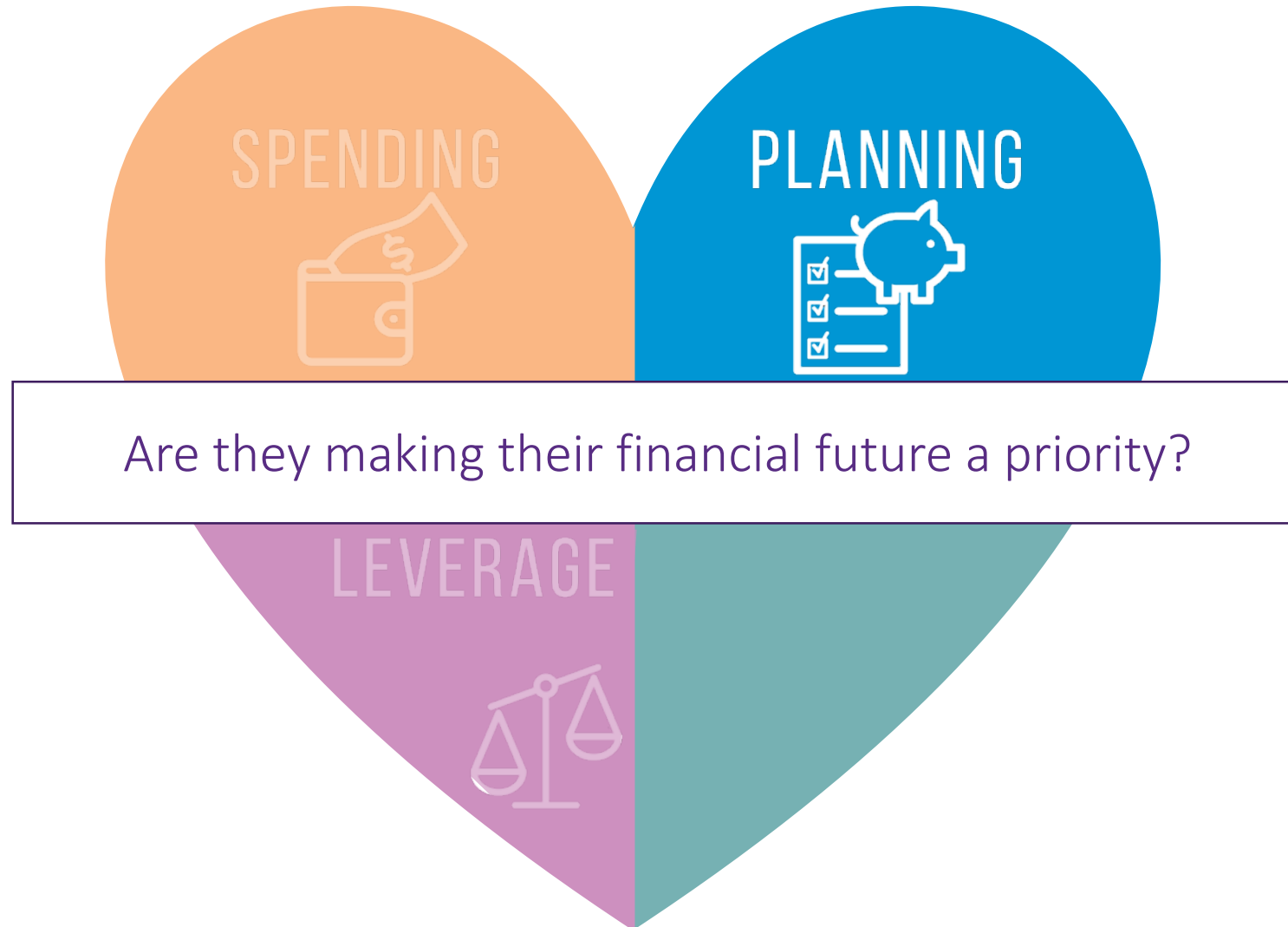
WealthCare's Four Key Pillars - Spending



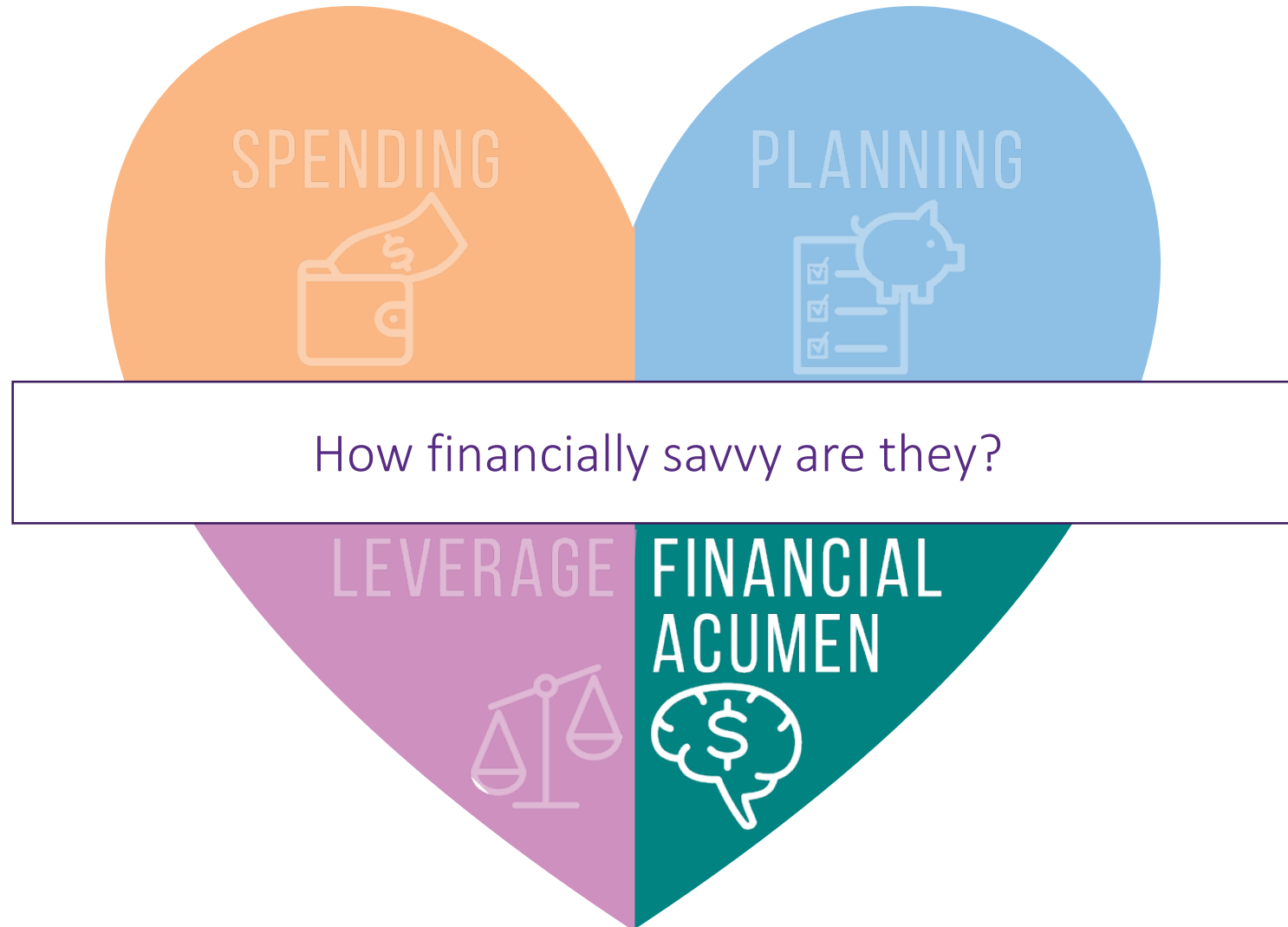
WealthCare's Four Key Pillars - Leverage



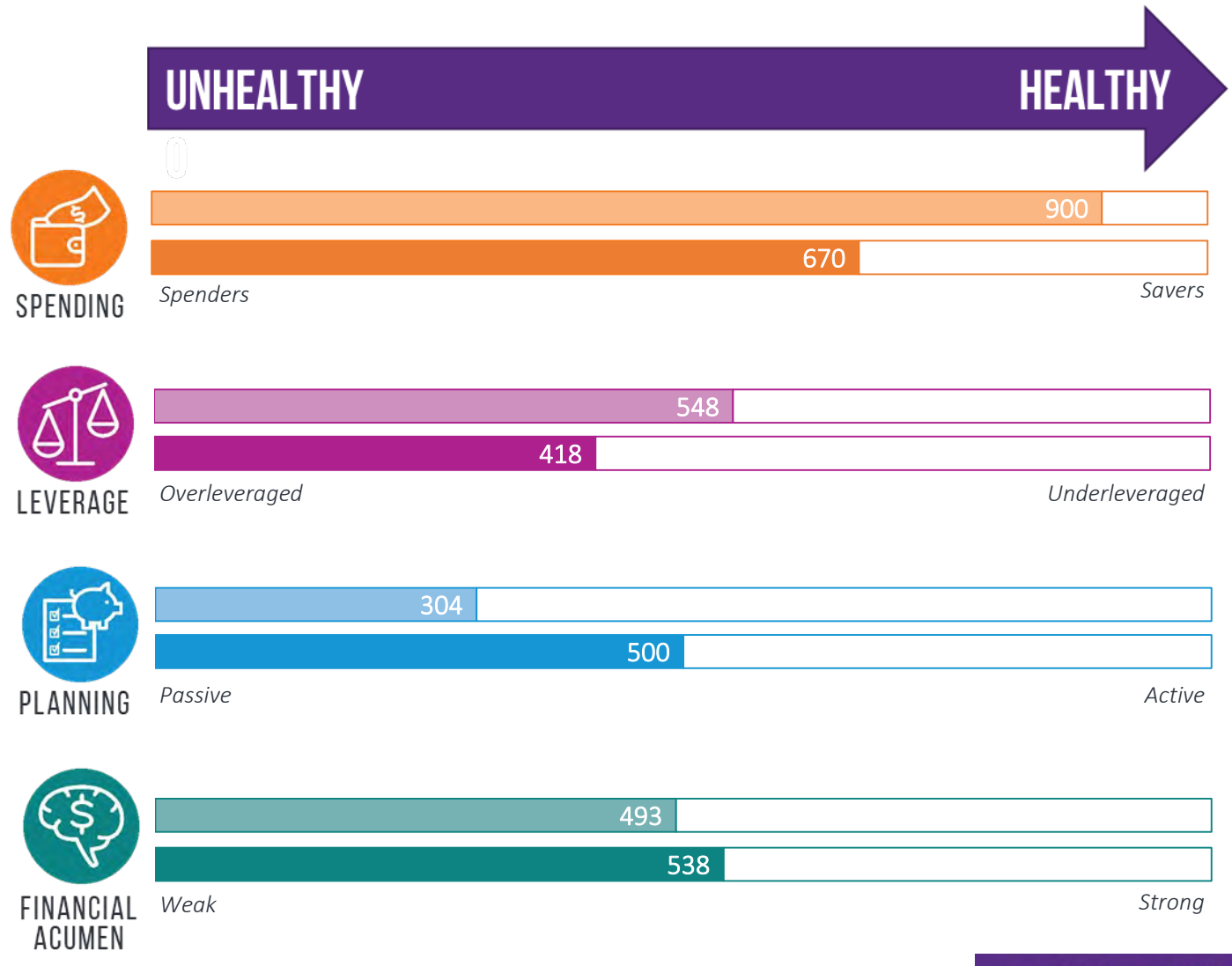
WealthCare's Four Key Pillars - Planning



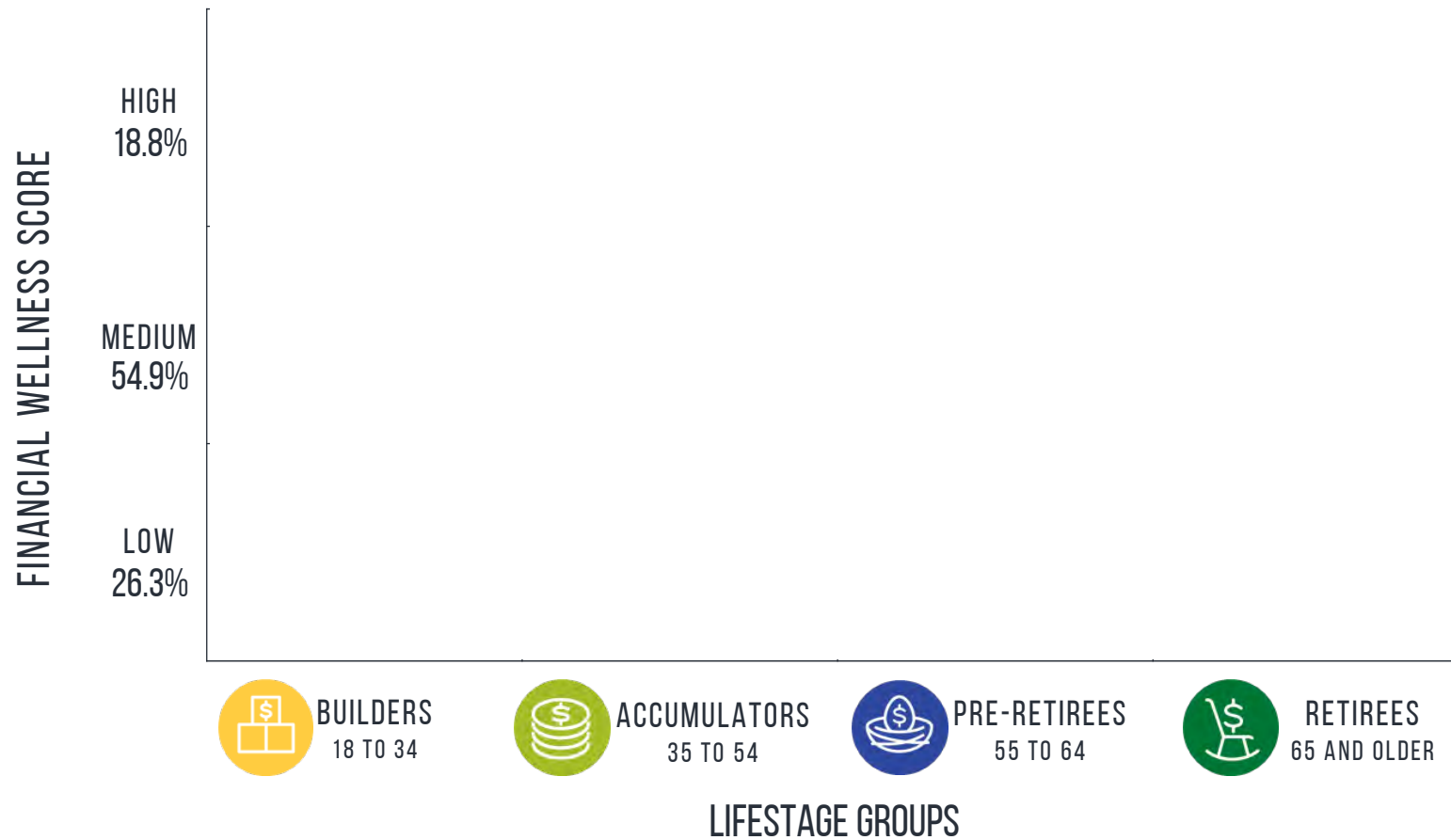
WealthCare's Four Key Pillars - Financial Acumen



WealthCare Score and Component Score



Financial Wellness by Lifestage



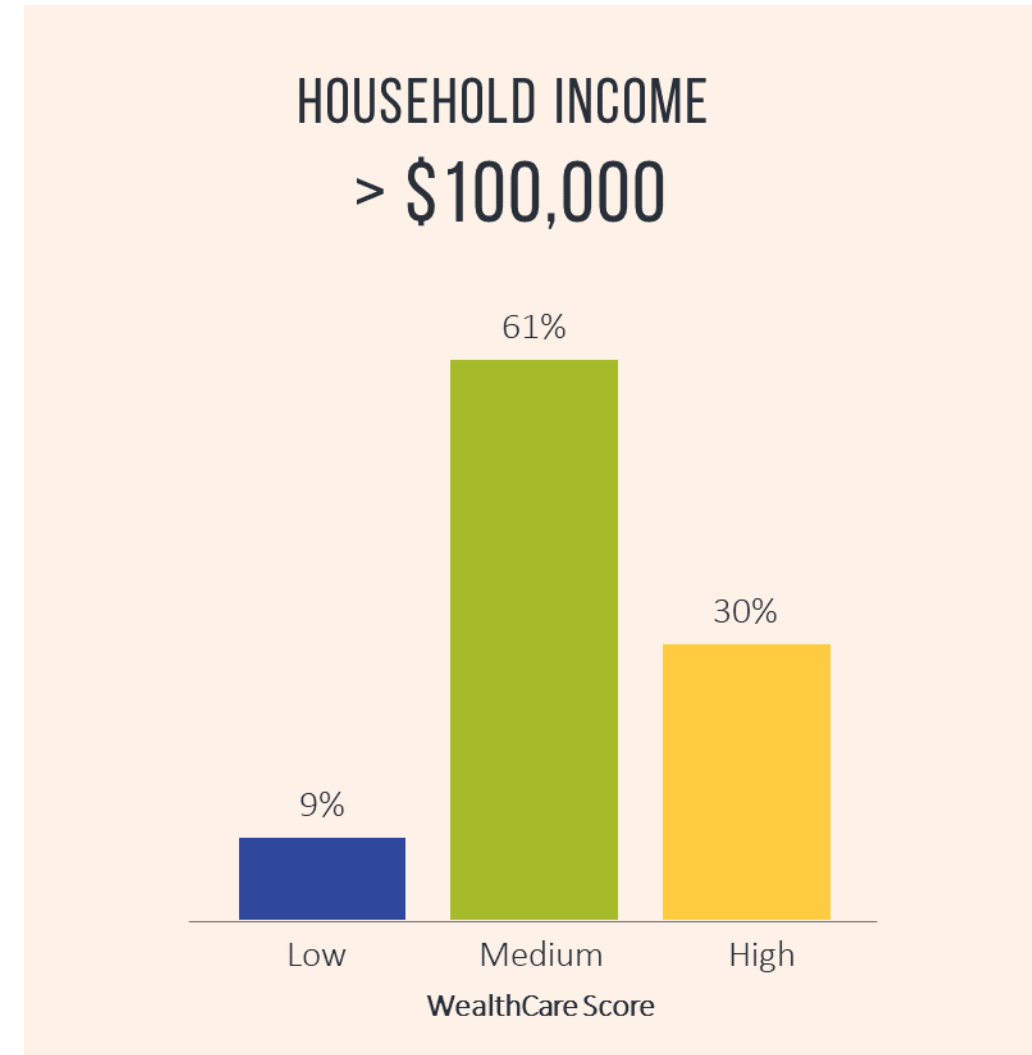
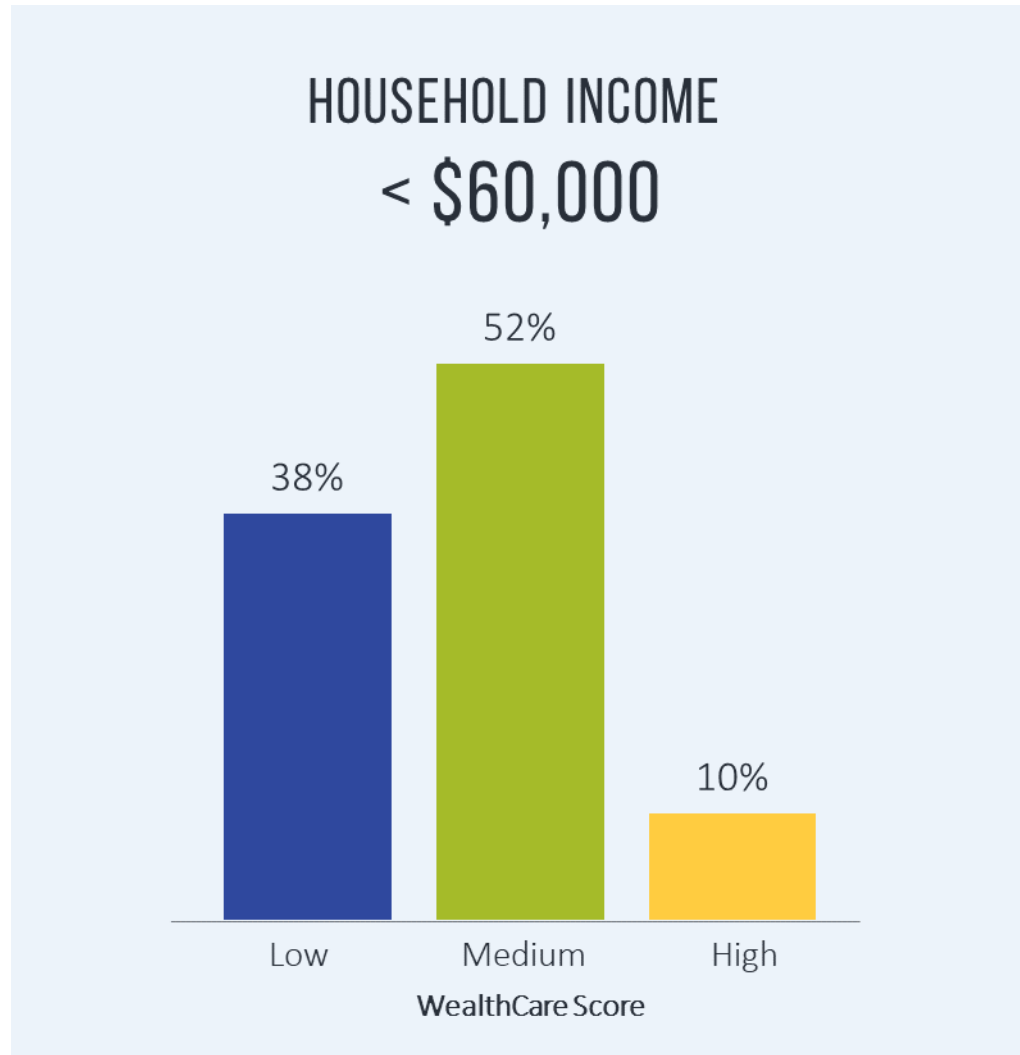
Score Legend	
High	611 – 1,000
Medium	281 – 610
Low	0 - 280

Financial Wellness by Lifestage

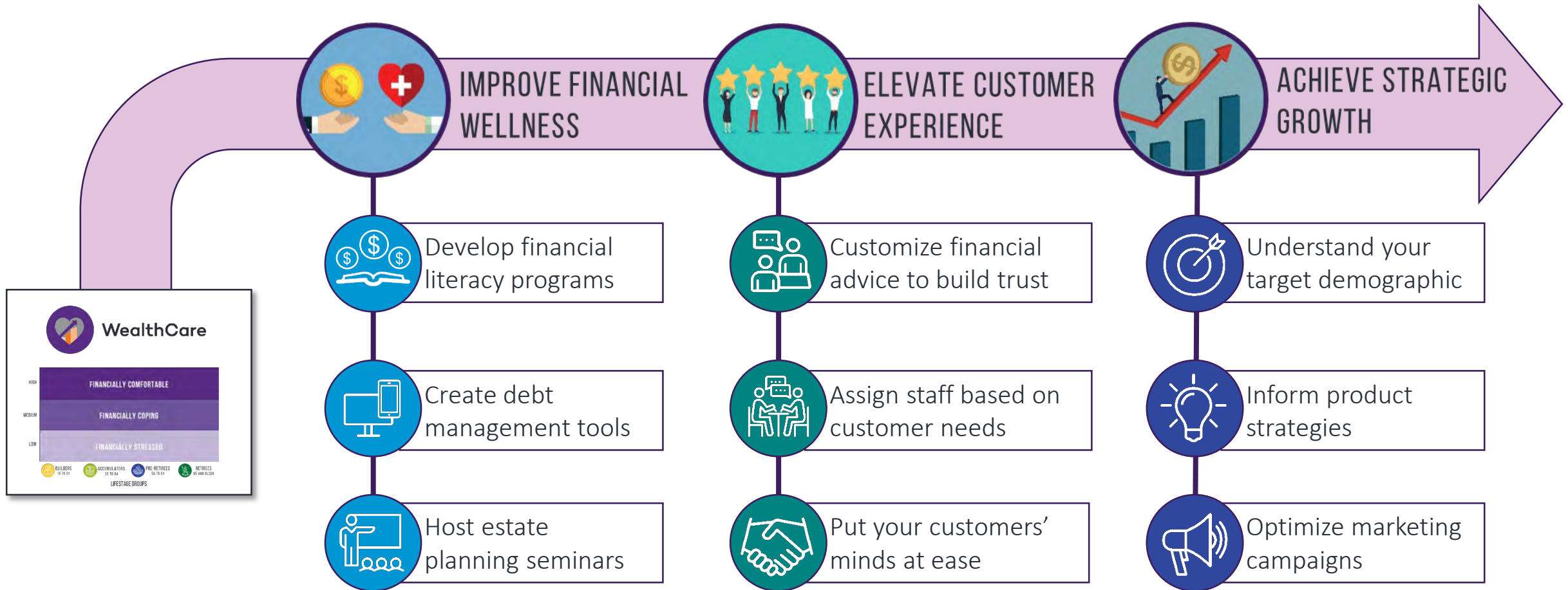


Score Legend	
High	611 – 1,000
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Low	0 - 280

Financial Stress does not Discriminate

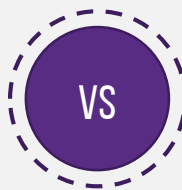


WealthCare Applications

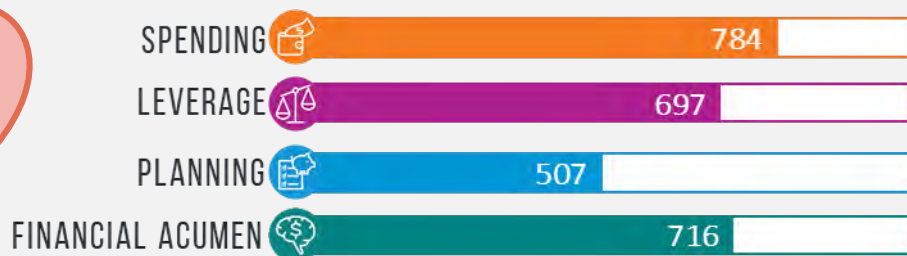




32 Years Old



32 Years Old



Couple
No Kids



Master's
Degree



Finance
Manager



New Condo
High Rise



Prefers
Mobile Banking



Full Credit
Card Payments



Contributed
\$4,600 to RRSP



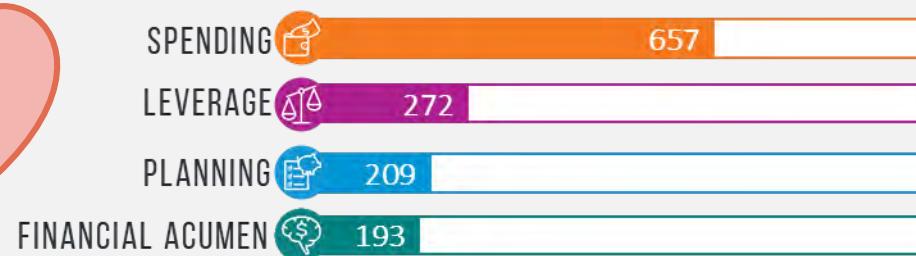
Made Donation
Last Year



metro

 **instacart**

BANANA REPUBLIC



Couple
with Kids



College
Diploma



Retail Store
Manager



Low Rise
Apartment



Prefers
Mobile Banking



Partial Credit
Card Payments



Contributed
\$1,400 to RRSP



No Donations
Last Year

**Tim
Hortons**

ZARA

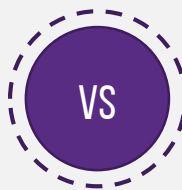
DAVIDsTEA

 **NOFRILLS**

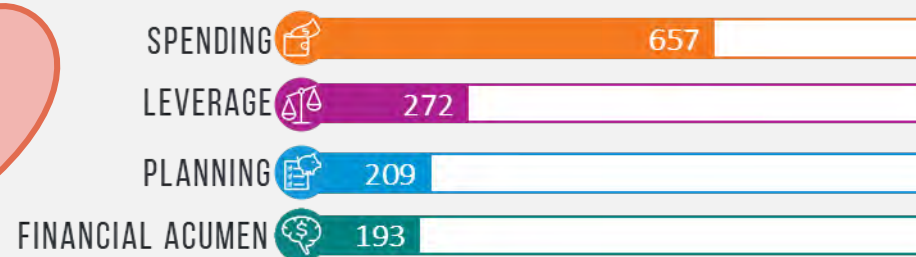
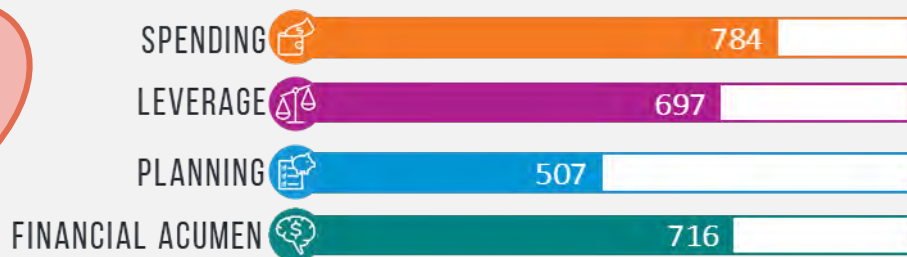
**ENVIRONICS
ANALYTICS**



32 Years Old



32 Years Old



FIRST TIME
HOME BUYER
PLAN



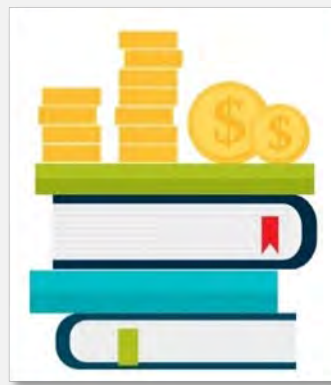
ONLINE
TRADING
PLATFORM



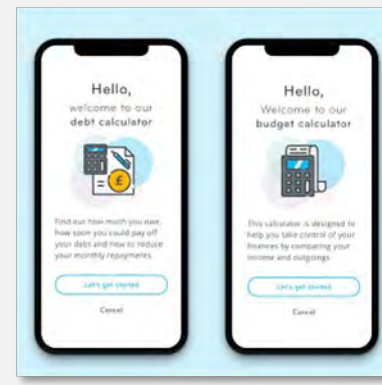
SPECIAL
PRODUCT
OFFERS



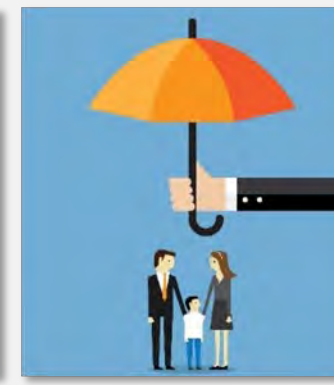
FINANCIAL
LITERACY
PROGRAMS



DEBT
MANAGEMENT
TOOLS



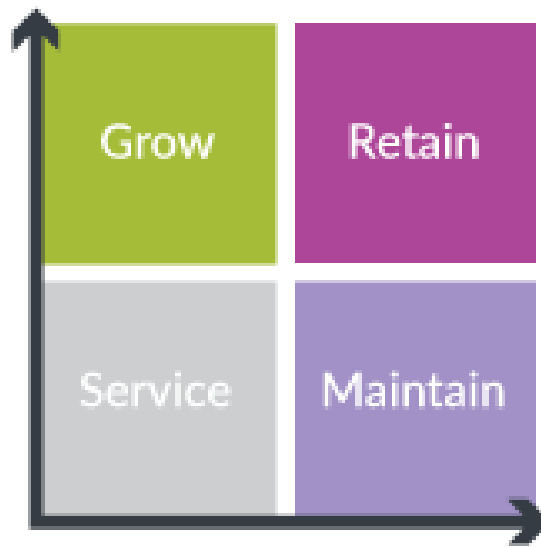
FINANCIAL
PLANNING
SERVICES



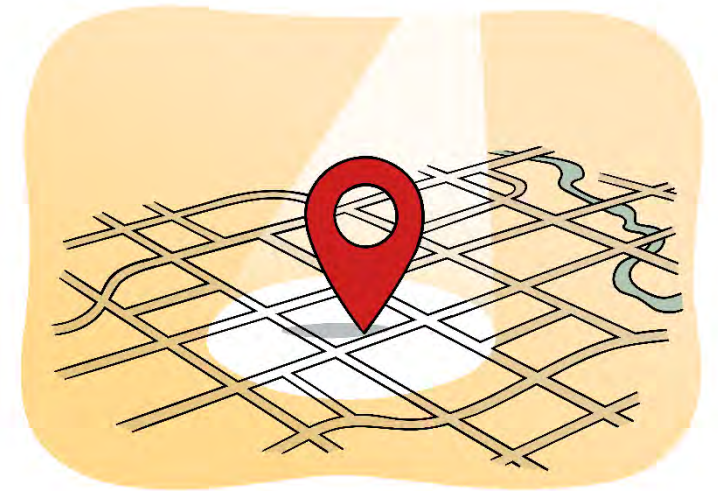
WealthCare is Easy to Integrate



Custom
Segments



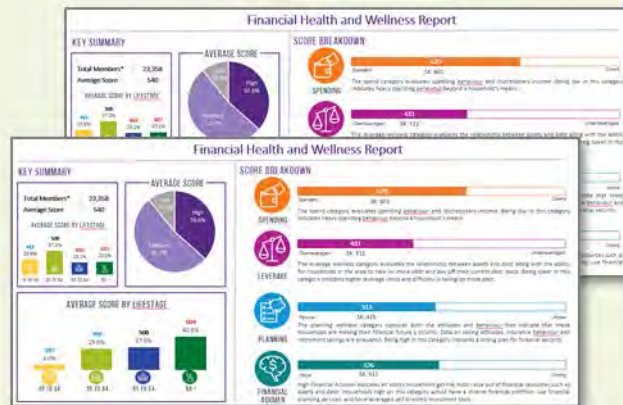
Economic
Segments



Location & Trade Area
Analysis

WealthCare Deliverables

AD HOC REPORT



APPEND TO YOUR CUSTOMER DATABASE

Client Name	Client ID	Client Type	Client Address	Client City	Client State	Client Zip	Client Phone	Client Email	Client Age	Client Gender	Client Marital Status	Client Income	Client Assets	Client Liabilities	Client Net Worth	Client Score	Client Risk Level	Client Status
John Doe	12345	Individual	123 Main St	New York	NY	10001	212-123-4567	john.doe@email.com	45	Male	Married	\$100,000	\$500,000	\$200,000	\$300,000	540	Medium	Active
Jane Smith	67890	Individual	456 Elm St	Los Angeles	CA	90001	310-987-6543	jane.smith@email.com	35	Female	Single	\$75,000	\$300,000	\$150,000	\$150,000	520	Low	Active
Robert Johnson	11111	Individual	789 Oak St	Chicago	IL	60601	312-555-1234	robert.johnson@email.com	55	Male	Married	\$120,000	\$600,000	\$250,000	\$350,000	560	High	Active
Emily White	22222	Individual	101 Pine St	San Francisco	CA	94101	415-777-8888	emily.white@email.com	30	Female	Single	\$90,000	\$400,000	\$180,000	\$220,000	530	Medium	Active
Michael Brown	33333	Individual	202 Maple St	Phoenix	AZ	85001	602-333-4444	michael.brown@email.com	40	Male	Married	\$80,000	\$350,000	\$160,000	\$190,000	510	Low	Active
Sarah Green	44444	Individual	303 Cedar St	Seattle	WA	98101	206-444-5555	sarah.green@email.com	38	Female	Married	\$110,000	\$450,000	\$200,000	\$250,000	550	Medium	Active
David Lee	55555	Individual	404 Birch St	Portland	OR	97201	503-555-6666	david.lee@email.com	42	Male	Married	\$95,000	\$380,000	\$170,000	\$210,000	525	Low	Active
Olivia Taylor	66666	Individual	505 Spruce St	Denver	CO	80201	303-666-7777	olivia.taylor@email.com	28	Female	Single	\$85,000	\$320,000	\$150,000	\$170,000	515	Low	Active
James Wilson	77777	Individual	606 Ash St	San Diego	CA	92101	619-777-8888	james.wilson@email.com	50	Male	Married	\$105,000	\$420,000	\$190,000	\$230,000	545	Medium	Active
Ava Martinez	88888	Individual	707 Hickory St	Austin	TX	78701	512-888-9999	ava.martinez@email.com	32	Female	Single	\$70,000	\$280,000	\$140,000	\$140,000	505	Low	Active
Ethan Davis	99999	Individual	808 Walnut St	San Jose	CA	95101	408-999-0000	ethan.davis@email.com	48	Male	Married	\$115,000	\$480,000	\$210,000	\$270,000	555	Medium	Active

LICENSE DATA IN-HOUSE (INCLUDING BENCHMARK)





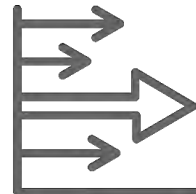
WealthCare Can Help Your Organization:



Understand your customers' financial health



Increase customer confidence and deepen relationships



Gain competitive advantage and grow your market share

Questions?



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