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Digital Advisor Strategy in Canadian Banking

Guided investment support across digital banking and wealth

The Case

Canadian Bank is exploring how to strengthen its digital advising capabilities so clients can receive guided investment support through digital channels like mobile and online banking. The experience may include personalized investment journeys, goal-based guidance, advisor-assisted interactions, and seamless movement between banking and wealth experiences. Enabling this capability will require integration across digital channels, client and account data, investment platforms, advisory tools, APIs, enterprise control functions, and analytics and AI capabilities that support personalization, next-best actions, client insights, and operational efficiency.

What the capability must bring together

