



Banking and Finance with iotum

The human-centric communication platform for accelerated support.

With privacy and security as a top concern, iotum's sophisticated solution augments your banking and financing offerings.

Putting People First

Acquire, build and retain relationships with clients using a high-quality video and voice solution that instills trust by showing your face and collaborating in real-time.

Safe and Private

Serious security and privacy mean protecting customer data with state-of-the-art security measures like One-Time Access Codes built into every level of communication.

Enhances Your Offering

Technology that fits into your already-existing workflow means you don't have to waste time starting fresh. Integrate instantly to bridge gaps.

iotum Makes Business Prosper



Banking

Connect customers, representatives, and officers to make new and returning customers feel confident about who they bank with.

- Browser-based technology
- Android and iOS mobile apps for e-visits, consultations, and more
- Connect anytime, anywhere – on-demand



Finance

Let clients check their portfolios and video chat with advisors from their phones using cutting-edge technology that empowers wealth management.

- High-quality video for face-to-face conversation
- Instant file and document sharing
- End-to-end safe and secure encryption

Video-enabled Customer Banking Workflow



Schedule a virtual visit ahead of time or make an on-demand booking.



Work and collaborate with other advisors using screen sharing, and file sharing.



Link the meeting to your email or calendar for an easy way to join.



Loop in other consultants for personalized quotes, management, and digital banking needs.



Stay connected from anywhere on any device. Remote locations with low bandwidth included.

Why iotum?

Ultimate Privacy and Security

Experience international security compliance and an unrivaled level of virtual meeting privacy: E2E encryption, granular settings, access codes, and more.

Faster Banking

Promote on-the-go banking and wealth management meetings with mobile apps that make attending calls and using applications easy.

Direct Customer Service

Immediate and personalized, provide exceptional customer service for customers and clients – zero downloads required.

Face-to-face Connections

Customers need to trust that their finances and data are safe. Read body language and nuance with high-quality video and voice.

Globally Trusted

Mitigate issues like inside trading, security breaches, and comply with local and international regulations and standards.

Streamline Business As Usual

Continue your workflow with a wide range of features designed to support and streamline internal and external meetings.

Other Integrations

Easily integrate iotum's technology into your current offering plus other integrations like Slack, Google Calendar, and Outlook.

Link World Markets

Gain on-demand access to telebanking and telefinance executives near and far, any time of day or night.

Recognizable Branding

Customize and brand your “virtual branch” with your business’ colors, logos, and forward-facing insignia.

Agile and Scalable

Reflect exactly what the market is doing. Easily expand to accommodate large global meetings or host multiple smaller meetings all at the same time.

71% Consumers want flexibility now prefer multichannel interactions

25% want digitally-enabled private banking with remote human assistance on-demand.

[McKinsey 2020](#)

Human-centric communication is paramount

34% of respondents rate voice-response bots and chatbot customer service the worst or below average.

[Unblu 2020](#)

iotum Key Features

Video and Voice

- Smart resolution, crystal clear video, and audio
- Customizable, versatile, and scalable API integration
- AI-powered service

Safe, Private, and Secure

- Access permission, private codes, and encryption
- Use Meeting Lock and One-Time Access Code for client information
- Safeguard client data with 128-bit E2E encryption

Collaboration Tools

- Mark up video, charts, and more in real-time with Annotation
- Share your screen, and upload, download, and store files on Drive

iotum Supports The Backend Of Banking And Finance

Banking

- Community
- Internet
- Savings and loans
- Investments
- Customer service

Financial Advisory

- Corporate
- Valuation
- Restructuring
- Value creation
- Financial crisis
- Customer service

Other Services

- Wealth management
- Mutual funds
- Insurance

iotum Supports Digital Banking Workflows

iotum's human-centric, safe and secure platform bridges the communication gap between customers and advisors. Whether small or enterprise, modernizing virtual banking and finances starts with iotum.

[Find Out More](#)

