

News Release

米国雑誌「Financial services review」掲載のお知らせ

この度、米国雑誌「Financial services review」の特集企画において、「Top 10 Wealth Management Service Companies in APAC 2022」に選出されました。また当社代表取締役北山雅一の記事が掲載されておりますので、お知らせします。

記事では、相続や資産承継の課題に対して当社システムを通じてどのように対応していくのかをはじめ、当社の強み、ビジョン等が掲載されています。

<https://www.financialservicesreview.com/capital-asset-planning>



**FINANCIAL SERVICES REVIEW**
TOP 10 WEALTH MANAGEMENT

Capital Asset Planning, Inc.

Providing a Unique Perspective to Wealth Management

The marginal maximum rate of inheritance tax, gift tax, individual income tax in Japan is 55 percent. As a result, many wealthy Japanese are interested in the migration of asset management and tax management.

cash and deposit, stock, investment trusts, and real estate.

"Business growth and business succession are important issues for wealthy families in Japan, and especially when they consider business succession, tax planning will be definitely required. We provide wealthy Japanese with solutions based on integrated consulting of tax management and asset management," says Masashi Kitayama, the CEO of Capital Asset Planning, Inc.

Currently, Capital Asset Planning is managing 2,400 families and 1.4 million Yen in assets with "WMTM".

"WMTM" uses AI to provide clients with customized development to support the on-premises operation of major financial institutions. The key is to provide solutions with embedded financial products that each financial institution wants to sell. Capital Asset Planning feeds the results generated by "WMTM" to the information systems of financial institutions through API. This enables financial institutions to display proposals and quotations of financial products automatically on their platform.

For one of its major life insurance clients, Capital Asset Planning has developed goal-based financial planning system and insurance quotation and application system, which enable their customers to make a contract on various insurance services online. The company has also worked with a megabank. When the megabank offers a loan to an unaffiliated company, it obtains the financial statements of the borrower. Based on the obtained financial statements, Capital Asset Planning carries out the valuation of the company's own shares in accordance with the inheritance tax law and clarifies the real assets of the family members of the borrower's CEO.

Then, "WMTM" considers the ability to pay inheritance tax, identifies where there are problems in the financial portfolio based on rules, and automatically display what products and solutions are required by using AI.

"What separates Capital Asset Planning is that they have a variety of standardized calculation libraries (more than 100 types) for the calculation logic functions, which can be provided by combining some logic for each financial institution or customized fully for them. This not only increases development efficiency but also allows the company to optimize the system solutions containing financial products that each financial institution wants to sell individually. By using these standardized calculation libraries, the company has the advantage of reducing development cost."

“We provide wealthy Japanese with solutions based on integrated consulting of tax management and asset management

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With existing clients as the top companies in their respective industries, Capital Asset Planning is currently planning to demonstrate "Whole Life Financial Planning" system in the virtual space of the Metaverse. It

Masashi Kitayama,
CEO