



## SUPPORTS PROFESSIONAL INVESTORS IN THE ENTIRE INVESTMENT PROCESS

Each aspect of decision making is taken into account on its own and as part of the overall process. Stages are supported proactively through workflows, digital information and recommendation channels.

### Challenge

Today professional investors are facing a variety of challenges:

- » *Legal, Tax & Compliance* – continuously changing and extensive growth of country specific regulatory requirements.
- » *Eroding margins* – rising costs vs diminishing returns.
- » *Competition* – more and more international competition / customers as becoming flexible and willing to emigrate and move away.
- » *Technology* – own and customer's technological needs and expectations are increasing.
- » *Expertise* – increasing complexity of investment products, needs and solution.

### Solutions

With ADDFINWEALTH, professional investors like independent asset managers benefit from a unique, web-based information and transaction platform that enables them to deal with the current and future challenges in a safe, efficient and client-focused way

### Main benefits

#### Technology

- » We provide an application, which the data are stored at the client request and the information can be customized
- » ADDFINWEALTH is safe, secure and flexible to adjust to needs and requirements

#### Information

- » We are displaying information and data that matters
- » ADDFINWEALTH works with the information and provide customized and intelligent answers that puts the user in a competitive advantage.

#### Ideas

- » We know the answers when it comes to solve problems
- » ADDFINWEALTH provide advisory ideas in different investment, legal / regulatory levels whenever it is needed

### Experience

- » We are a young enterprise with a strong practical background in the professional asset management field. ADDFINWEALTH workflows and quick links are designed to address the challenges and support proactively and intuitively with solutions.

### Key features

#### Client Relationship

- » CRM & sales support
- » Full onboarding process
- » Legal and regulatory compliant
- » Research & Investment information
- » Strategy-selection through Institutional standards
- » Benchmarking
- » Trading list
- » Connections to external portfolios
- » Live – Financefeed
- » Indices
- » Products
- » Currencies

#### Portfoliomangement

- » Banking-interfaces
- » Consolidation
- » Transactionlists
- » Fee-transparency
- » Reporting
- » Portfolio simulation
- » Benchmarking
- » Finance feeds

#### Compliance

- » Identification
- » Risk-profiling
- » Compliance – Checklists
- » Compliance Workflows
- » Compliance Documentation
- » PEP Check / PIB Informationen
- » Automated generation of compliance forms and reports
- » Audit-Tracking (change-log)

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