



YOUR
NEXT GENERATION
WEALTH MANAGEMENT
SOFTWARE





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Who we are.

Vision.

We strive to build the financial platform of the future.

Mission.

Simplifying complex processes and structures to make faster and more efficient decisions while providing a highly flexible platform.

Values.

We aspire to create and maintain an enjoyable and productive working environment, which motivates us to grow beyond ourselves. We challenge us and our solutions to exceed our clients' expectations.



What we do.

Founded...

- In 2012 in Munich, Germany
- By three Investment Professionals
- With deep knowledge of complex Family Office structures and
- In-depth wealth management expertise.

Driving...

- Cloud-based next generation wealth management software
- Accessible anywhere and anytime
- Consolidating all asset classes and
- Complex legal entity structures
- Enhancing your investment decisions.

Supported...

- By a dedicated team of more than 60 professionals
- With a broad expertise across the field
- Aiding a wide range of wealth oriented clients
- With more than 120bn AUM.



Our focus.

**One Tool. One Platform. Any Device.
All Assets. Anytime. Anywhere.**

- Manage all assets on a scalable and secure platform.
- Present complex structures simplified and intuitively.
- Analyse any asset allocation and structure meticulously.
- Access your data anytime, wherever you are.
- Track financial information through centralized interface integration.



Our clients.

Family Offices.

- Single Family Offices
- Multi Family Offices

Asset Manager/Institutional Clients.

- Banks
- Trusts
- Foundations
- Investment Funds
- Institutional Investors
- Robo Advisors
- Administrators

Consultants.

- Independent Financial Advisors
- Registered Investment Advisors
- Tax Advisors



Our value.

Analyse. Manage. Control. Report.

- Representation of complex ownership structures.
- Extensive controlling functions.
- Powerful analytics.
- Flexible reporting options.
- Individual customer portal.
- Document management.
- Automated accounting.



Data interfaces.

Centralized financial data through broad and diverse data interfaces.*



*Extract – For a full overview of data interfaces please contact us.



Security.

Your safety takes precedence.

- Our servers are located in high security data centres and comply with the highest security standards to ensure safety and anonymity.
- Software access via a 2-factor-authentication and personalised QPLIX access.
- Segregated and encrypted back-ups on a daily basis.
- Dedicated system access management for collaborating, monitoring and tracking.



Your benefits.

Everything at a glance.

- Customized experience – Anytime and wherever you are.
- Safe and secure – Ensured by the highest standards.
- Process automation – Saving you time and expenses.
- Enhanced decisions – Simplification and thorough analytics support your decision making.
- Improved controlling – One system to support your risk management practices.
- In-depth experience – Profit from best practices and an ever improving tool.



Your contact.

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