



FINARTIS

COMPANY PROFILE

WE HELP WEALTH MANAGERS WORLDWIDE SERVE THEIR CLIENTS BETTER



www.finartis.com



#1
IBS BEST SELLING
2019

“Price is what you pay, value is what you get”

Warren Buffet

Sam Walton, founder of Walmart, once said: “There is only one boss: the customer. And he can fire everybody in the company from the chairman on down, simply by spending his money somewhere else.” At FINARTIS, we share Sam Walton’s philosophy. We put our customers first – your success is our success.

FINARTIS is a leading software publisher and entirely self-financed company, which was founded in 1986. We serve clients all over the world from our headquarters in Switzerland. We design and develop high-quality, multi-channel front-to-back office solutions for financial institutions such as private banks, asset managers and family offices. Our software allows them to build smarter businesses, improve customer loyalty and generate higher returns.

Our clients turn to our software to manage their evermore complex financial operations with maximum cost-effectiveness and efficiency. Our team of finance and technology experts works closely with our clients to understand their needs and create a comprehensive, flexible and efficient solution, which is easy to use and truly proactive.

Digitally-enhanced Client Relationship

We offer out-of-the-box solutions that allow financial institutions to differentiate themselves by offering their clients a comprehensive suite of services. Bringing personal advisor relationships online allows you to free up resources that can be better used to develop and deepen client loyalty.

Increase Front-Office Productivity

We increase the productivity of your client-facing staff by reducing their administrative tasks. Our software enables advisors to focus on what’s important: higher value-added services that increase revenue and deepen client relationships. The results can be seen in solutions which deliver both a substantial reduction in the cost-to-serve and an increase in cross-selling opportunities.

Attain Operational Excellence

Our solutions enable you to implement fully automated processes throughout your entire value chain. Your organization’s operational risks are lowered through the timely and accurate processing of all operations. This in turn allows your company to reduce its overheads and increase its agility.

About FINARTIS

WE VALUE RELATIONSHIPS

A WORD FROM OUR CEO



Software is all about simplifying complex business situations and environments. This is what first attracted me to technology and inspired FINARTIS since its foundation in 1986 under the SAGE name as it was called then. I've put together a team which is passionate about technology and creating innovative and accessible software which is focused on value creation for clients.

Our clients come from a wide range of finance-related backgrounds. They have come to trust our advanced technology to manage the ever more complex array of financial operations they confront. Our solutions help

them to deliver better service to their own clients, leading to higher client retention and improved margins. We seek to improve front office productivity and the value added services you can bring to your clients.

At FINARTIS, we're committed to working together with you to deliver middle- and back-office operations excellence through intelligent solutions. We're looking forward to you joining us in the Prospero community as one of our clients or partners. Together, we can strive to make the world of finance simpler, safer and more efficient.

Jean-Luc Freymond
Chief Executive

Our Clients

SWISS EXCELLENCE
IN A SINGLE USER-ORIENTED SOLUTION

"An investment in knowledge pays the best interest."

Benjamin Franklin

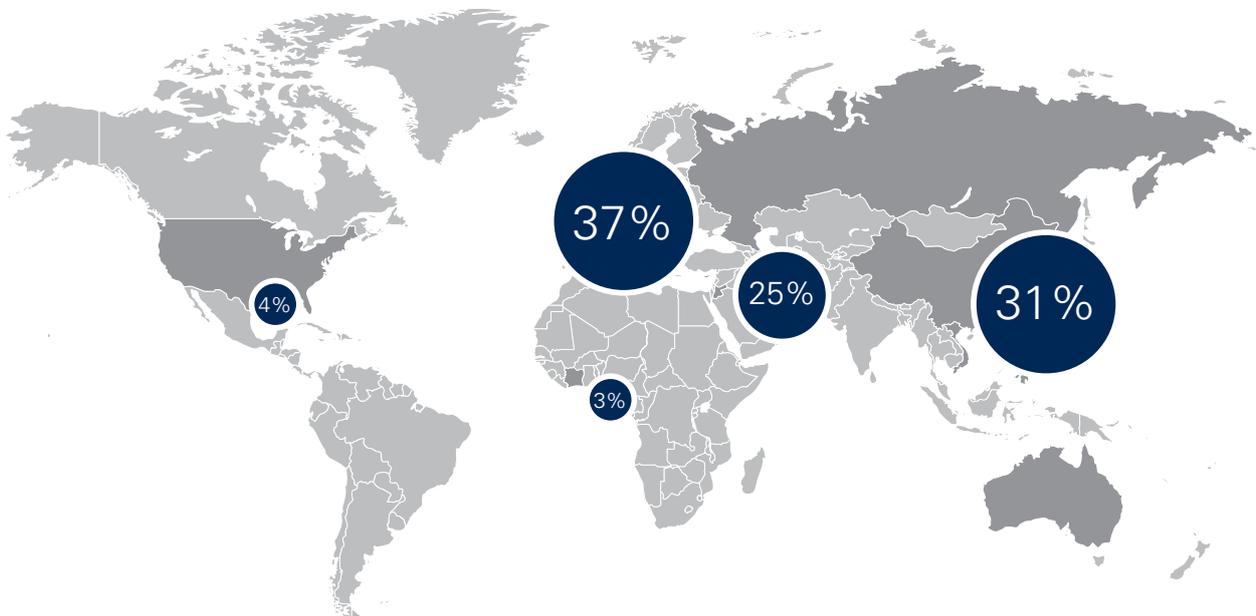


Fig 1. Prospero clients worldwide distribution

We serve customers all over the world from our offices in Europe, Asia-Pacific and the Middle East. Our diverse team of business and technical experts has a comprehensive set of skills that allow us to cater for

all our client's requirements. We're available around the clock to advise our clients and ensure efficient project implementation.



USD 500BN
AUM

Swiss Expertise and Best Practices at Your Service

Prospero 365 was conceived in Switzerland, a country with a rich history in banking and finance. Switzerland's world-class banking industry is renowned for its diversity in products and services. Maintaining its status among the world's foremost banking industries requires highly dynamic systems that can support the wide range of operations it performs across the spectrum of asset classes, currencies and regulations. Prospero 365 allows each client to navigate this environment and become a reference in its space.

Global Reach

A range of financial institutions across the globe from private banks and family offices to wealth managers and asset managers turn to Prospero 365 to assist in managing their wealth and automating their processes with our smart analytics and fully automated workflows. We enable them to gain new clients, while exceeding their existing clients' expectations through enhanced transparency and more intelligent investments.



What Our Clients Say

"We are thrilled to welcome Treppides Fund Services in the Prospero users' community and assist them with their ambitious growth objectives.

Prospero's unique modular design that integrates rules and workflow engines make it possible for smaller Fund Administrators such as Treppides Fund Services to benefit from a robust system otherwise only accessible to very large institutions.

After completion of the short implementation project, the new system will let Treppides Fund Services serve their clients with the level of excellence and reliability that they can only expect from the best Fund Administrators."

Andreas Yiasemides, Partner
Treppides Fund Services Ltd

Every great collaboration starts with a conversation

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