


The logo for Wize by TW. The word "Wize" is in a large, white, sans-serif font. Below it, "BY TW" is written in a smaller, blue, sans-serif font. The background of the entire page is a blue-tinted photograph of a snowy mountain range with some technical grid lines overlaid.

Wize
BY TW

THE ALL IN ONE WEALTH & ASSET MANAGEMENT SOLUTION

For Independent Asset
Managers, Family Offices, Fund &
Asset Managers, Banks, Securities
Traders and more...

A small red square with a white plus sign, followed by the text "swiss made software" in a white, lowercase, sans-serif font.

 swiss made software

OUR SOLUTION



One single Web-integrated software solution that covers always more of your business needs going from compliance, regulatory, portfolio management, client side reporting and e-access.

Our focus: Intuitive user experience, rich & performing functionalities, easy & transparent pricing model.

01
INDEPENDENT
ASSET
MANAGER

02
FAMILY
OFFICE

03
FUND
MANAGER

04
SECURITIES
TRADER

05
PRIVATE
BANK



COMPLIANCE

KYC /CRM
AML
MiFID II
LSFin /FIDLEG



**PORTFOLIO
MANAGEMENT**

Consolidation
Multi-custodian
Risk management
Performances



**ORDER
MANAGEMENT**

Rebalancing
Pre-trade checks
Hedging tools
All instruments



**CLIENT
FOCUS**

Tailored reports
e-banking access
Mobile App
Call reports



**ADMIN &
BACK-OFFICE**

Fees invoicing
Custodian datafeeds
Data connectors / API
External fees analysis



SERVICES

- + **Easy pricing model:** All-in-One monthly subscription.
- + **Setup & Implementation:** Customisation, White labeled, a professional local team, training & helpdesk included.
- + **No hardware investments:** Platform provided in SaaS mode (Software as a Service) on TeamWork Private Cloud. On premise setup also available upon client request.
- + **Back-office services (BPO):** provided by TeamWork (optional)
- + **All new versions** and new functionalities **included.**



Since
1999



800+
Employees



125 M
CHF



18
Offices

TEAMWORK

TEAMWORK is a Swiss company specialized in **IT services & solutions**. Founded in **1999** by its current CEO Philippe Rey-Gorrez, the company has grown over the years and has now reached the **800 employees** cap. It is present in **18 locations** all over the world, with headquarters located in Geneva, Switzerland.

TEAMWORK is a key player in consulting and integration.

TEAMWORK is recognized by its customers to increase their performance, support them in their transformation and provide highly skilled profiles.



WIZE by TeamWork

30 rue de Saint-Jean, CH-1203 Geneva

+41 22 949 13 13
info@wize.net

Geneva | Singapore | Montreal | Luxembourg

www.wize.net