

Welcome to Altoo

Three simple steps to become client of Altoo

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Get to know Altoo

- To get to know about the Altoo Wealth Platform, please contact us via www.altoo.io/contact-us
- Our team will contact us to arrange a live demo of the Altoo Wealth Platform, either in a physical meeting or via video conference.
- As a follow up, you may request to have your own demo access to get a hands-on experience of the Altoo Wealth Platform.

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Onboarding

- **Contract:** You will sign a 'SaaS-contract' to get ready for onboarding
- **Access:** Within 24-h we will provide you or your delegate users access to the platform, enabling you to start uploading data
- **Bank Connectivity:** We will define together with you which custodians shall be connected, followed by sending you an onboarding package for each bank.
- **Non-Bankable Assets:** The platform allows you to input your non-bankable assets yourself, or you may delegate the data handling to our Curator Service, taking over all manual activities for you.

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Daily Business

- **Training:** You will experience, that the Altoo Wealth Platform is very intuitive to use. In addition, we offer Training Session, guiding you through the different features.
- **Data Update:** Once the Bank Connectivity is established, the data for bankable asset is updated daily.
- **Support:** Our Wealth Servicing team is available during Swiss business hours to support you via phone, e-mail or video conference.
- **Change in Wealth Structure:** In case your personal wealth structure will change (new custodian banks, additional users, etc.) we are at your disposal to update the platform accordingly.