



Presentation: Company and Product Presentation

2021

BETTER TECHNOLOGY FOR WEALTH MANAGERS

Client Portal



Performance & Cost Reporting

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- Standardized core allows for high gross margins
- Modular
- Foundation of scalability

- Personalization adds distinct brand value to customers
- White labeled services
- Customizable per customer

Customers Love Sharpfin



"With Sharpfin we have taken a major step forward in the digitalization of our advisory process. On average, **we save 30 minutes per advisory meeting** utilizing Sharpfin's solution.

- Martin Ringberg, Country Manager Sweden, Nordnet (Scandinavia)



"I love the user friendliness of Sharpfin Wealth Management Suite. With their flexible compliance rules engine **we now have a better view over the risks in our investments**, and with a full history of changes."

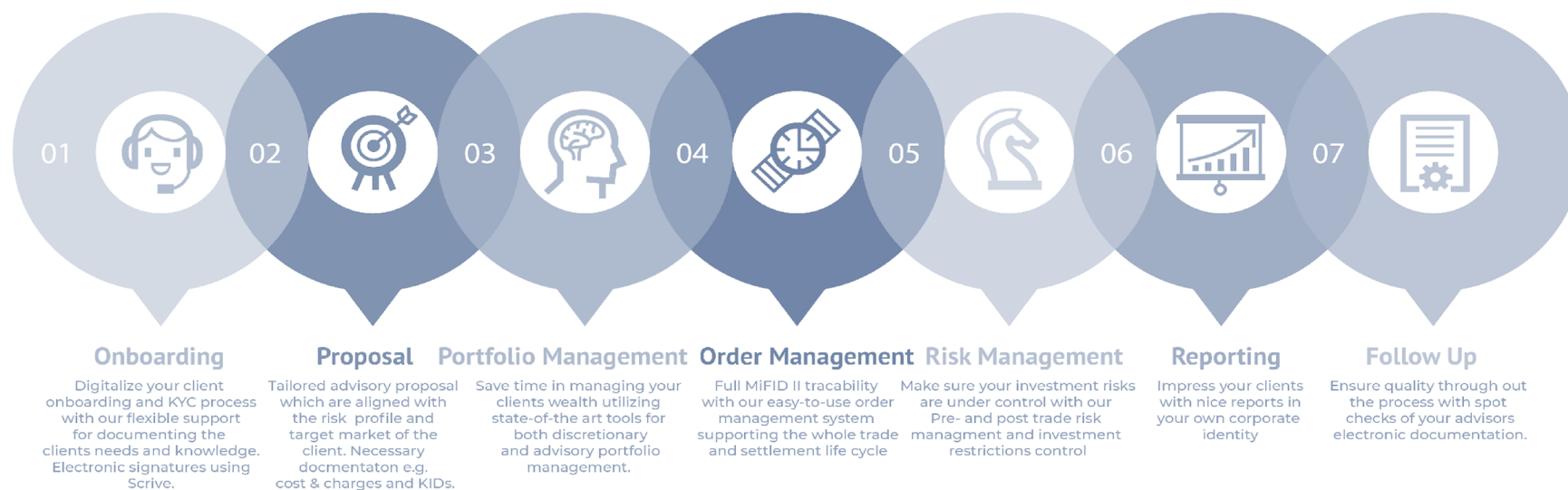
- Wolfgang Lechner, Business Analyst, Privatconsult (Austria)



"With Sharpfin we have found a vendor with a brilliant understanding for our needs. Their solution **significantly increases quality in our customer reporting and saves a lot of time** for our wealth management and administration personnel."

- Patrik Soko, CEO, Consensus Asset Management (Sweden)

Sharpfin Offering



Our product suite is designed to cover all aspects of wealth managers daily business.

Our statement to you as a customer

When you buy Sharpfin, you get ...

- ✔ Proven, robust data load processes and (optionally) our market leading data quality service
- ✔ Intuitive and easy to use wealth management and advisory software
- ✔ Market leading financial software quality
- ✔ Very quick response to your requirements - New software release, at least once weekly
- ✔ Well educated support to take immediate actions on your concerns.



Data quality services



Data consistency

- Optionally, Sharpfin offers a high profile data quality service to make sure that your data in the system is consistent with your depot bank data at all times.
- You are very welcome to perform the daily data quality task yourself utilizing Sharpfins' data quality tools, offered included in the service fee of Sharpfin Core.

“ANY FINANCIAL SOFTWARE IS ONLY AS GOOD AS THE QUALITY OF THE UNDERLYING DATA!”

Price Model



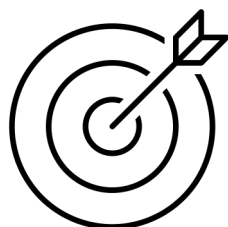
License Fee

- ✔ The software is licensed as a service on a month by month basis
- ✔ Add as many users as you want for the same fee
- ✔ A fixed and volume based license model is applied to wealth managers

Professional services

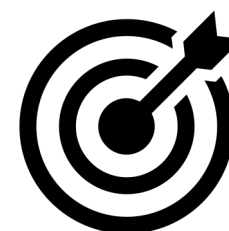
- ✔ Integration effort to depot banks or other systems is offered based on time and material
- ✔ Personalisation is offered based on time and material

Sharpfin Value Proposition



Family Offices

- Consolidation of holdings and performance cross depot bank
- Add any non listed asset type such as dept, art, real estate or non listed securities to your portfolios
- Always be up to date with your holdings for your family and family members
- Reporting on demand for your next board meeting



External Asset Managers

- Flexibility layer on top of depot banks
 - Maintain your own prices
 - Add non listed holdings for your clients
- White labeled reporting and customer portal in your corporate identity
- Communicate safely with your clients in Sharpfins eco system
- Flexible KYC and AML module with full MiFID II compliancy
- Calculation of management fees for many clients at once

Contact Us

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