

User Journey Overview

Buying

- Intro meeting to discuss client's needs
- Demo session to show functionality of FeeHub
- Strict NDA to secure your data
- Quarterly subscription with an option to cancel any time

Onboarding

We need the following data:

- Quarterly portfolio statements
- Transaction list
- Agreed fee schedules with you banks

All data can be easily requested from your banks (2-3 days)

We take data security very seriously

- Data collected via encrypted channels
- Data stored on encrypted Microsoft Azure server located in Switzerland
- Two-factor authentication and access logs

Interaction

We monitor your fees

- Fee data a securely stored in Fee Hub platform
- Continuous fee monitoring and reconciliation
- Benchmark analytics to ensure lowest fees

We take action once we see reduction potential

- Alert once a sizable fee reduction area is identified
- Support in designing fee negotiation strategy
- Negotiation execution (on client request)