Your journey to a platform that is fit for the future

Design Discovery

From the beginning, we want to understand your current challenges and product needs

We sit down with you to make the design specification

We design and adjust the platform to fit into your way of doing things

Implementation

Once the design is in place, we guide you through your new system and get you well prepared

We gather all relevant data from your custodian banks and import historic data.

Additionally, we ensure that configurations for things like users, portfolio structures, and clients are set up.

The Daily Operation

You'll discover that our platform is very easy to use

You can Access portfolio metrics, modify holdings, utilize Firmwide analytics and much more…

Your clients/family members can see their total wealth through your Appstore white-labelled app (powered by us)

Ongoing Support

Once you become a client of ours, you will experience that we are in close client dialogue and welcome any questions you may have at any time.

You get access to an account manager who will welcome and listen to your feedback and wishes

We focus on listening to you and continuously improve and develop new features.

Typically 4-6 weeks. NO Consultancy Fees, NO Onboarding Charge…. Just great service

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