# Interaction You and Fincite

—— Fincite as a full-service provider

A Family Office can lay back while we implement the software for you:

- Contact Christian Terpe as the Sales Lead for Family Offices for a personal demo. In this demo he will find out your **pain points** and will suggest you the **perfect and individual suited software package** for you.
- After you have chosen your software package, our Products Team will reach out to your IT department to build (very few) **interfaces** to your internal technical systems. At the same time, our UX department will **white-label** the software package for you.
- We will conduct **1-2 workshops** with you, guiding you through your new software and ask for feedback on modifications, which we will implement quick.
- Your relationship managers or advisors will **test the application for 1 week** in order to make your new software go live.

## Family Office Case Study

### Combine SaaS with individual software development

Fincite core modules “Fincite.CIOS” comprise of state-of-the-art backend engines, that are hosted in a **Microsoft Azure** environment, are engineered via **Python** and are available via **Rest-API (JSON)** – **SDKs** available.

We stand for **individual software development** as well as **off-the-shelve software-as-a-service** products.

Thus, we **combine** both the benefits of SaaS and individual development: Low and cost-efficient implementation times by at the same time keeping our software modular and customizable for your IT requirements.

# We always start with the client needs

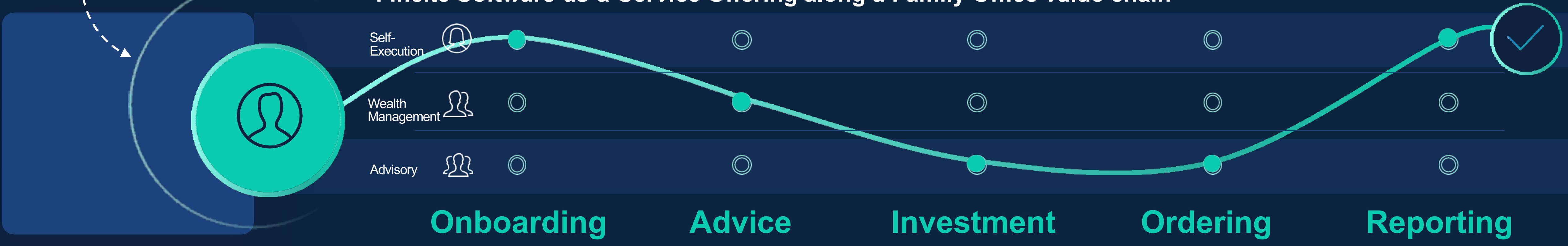
—— We can help you along a Family Office whole value chain with our modular plug and play software

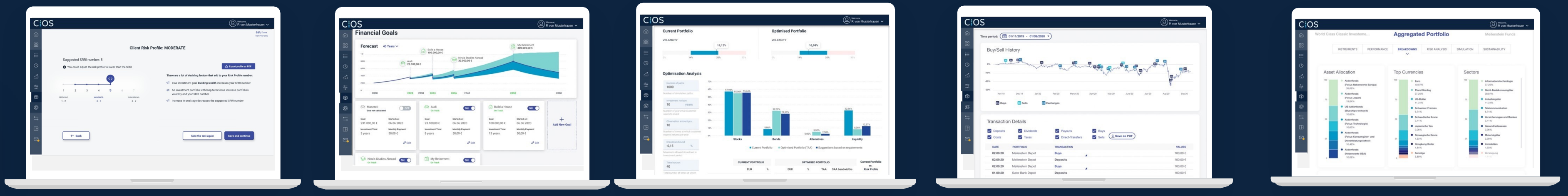
We solve challenges family offices are facing within their wealth management, advisory, or even self-execution services with the means of intelligent software.

From onboarding (risk and ESG profile, etc.), advice (automated investment proposal or wealth forecast), investment (portfolio optimizations or rebalancing), order execution (FIX, SWIFT or direct custodian connection) as well as regular reporting (portfolio aggregation and analysis).

You have it in your hands! Our award-winning software helps you build the software for your individual requirements in a modular, lego-brick-like way. From onboarding a customer to reporting.

**Fincite Software-as-a-Service Offering along a Family Office value chain**



We got your attention? Book a meeting with me for a full software demo!