

# 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

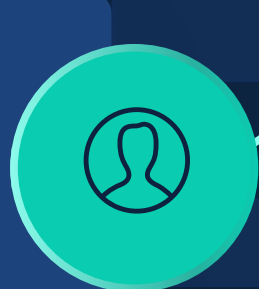
We solve challenges family offices are facing within their wealth management, advisory, or even self-execution services with the means of intelligent software.

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



Self-Execution

Wealth Management

Advisory



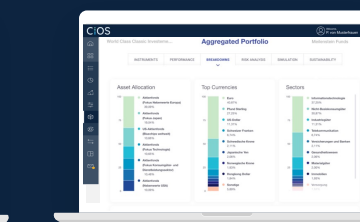
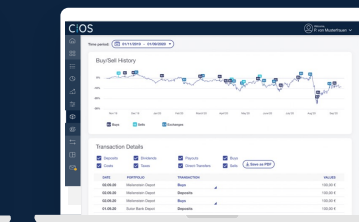
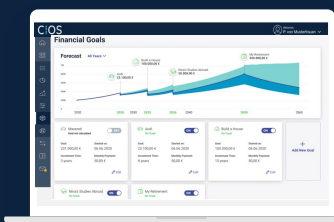
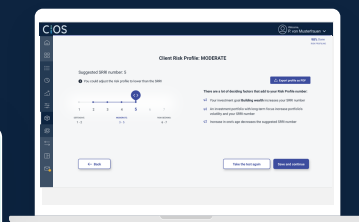
**Onboarding**

**Advice**

**Investment**

**Ordering**

**Reporting**



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



# Onboarding.

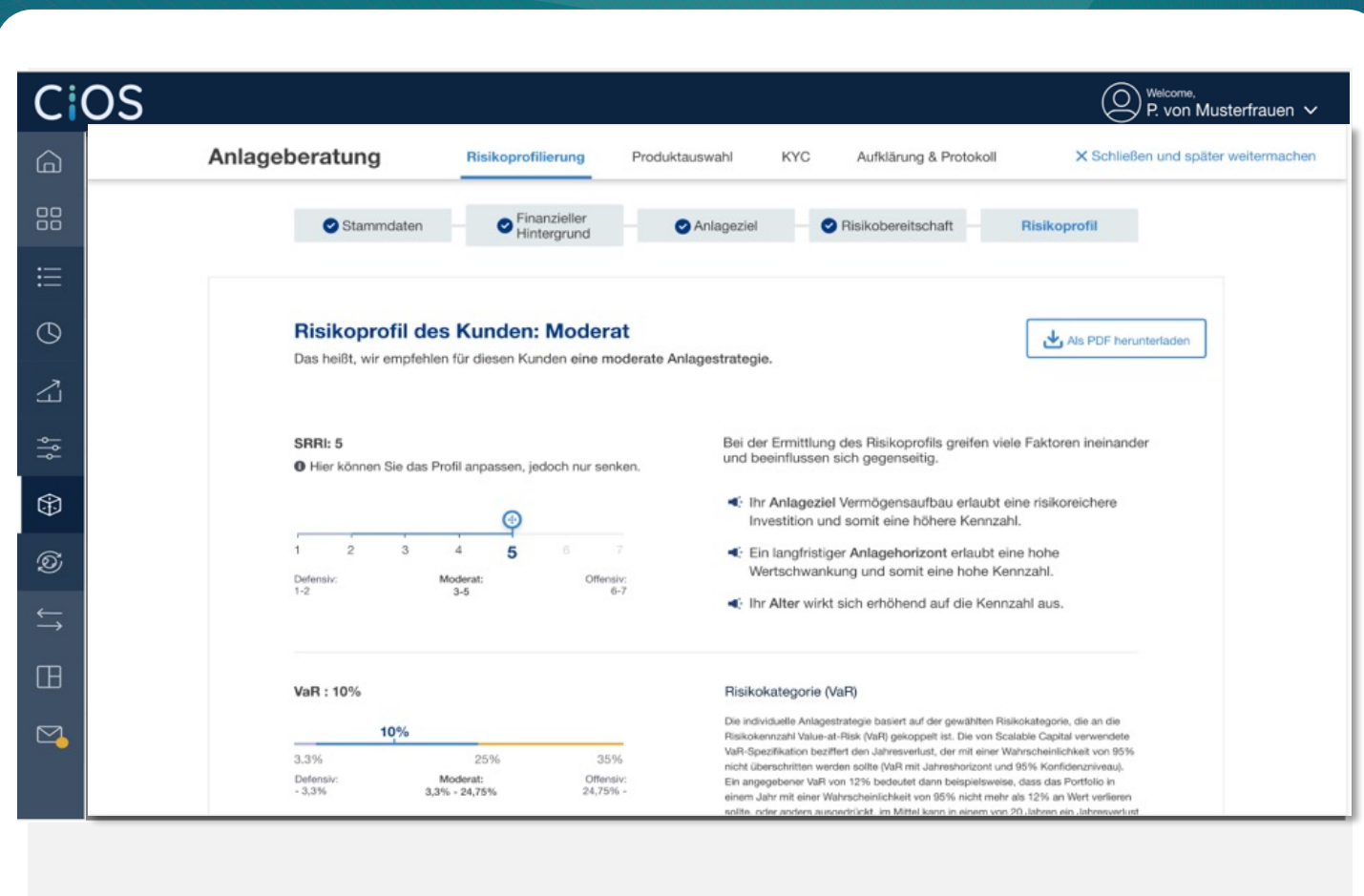
Fincite's Onboarding stands for modularity. You define the exact design as Self-Execution, Advisor-Driven or Hybrid path. Take the controls in your hand!

Advice.

Investment.

Ordering.

Reporting.



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Onboarding.

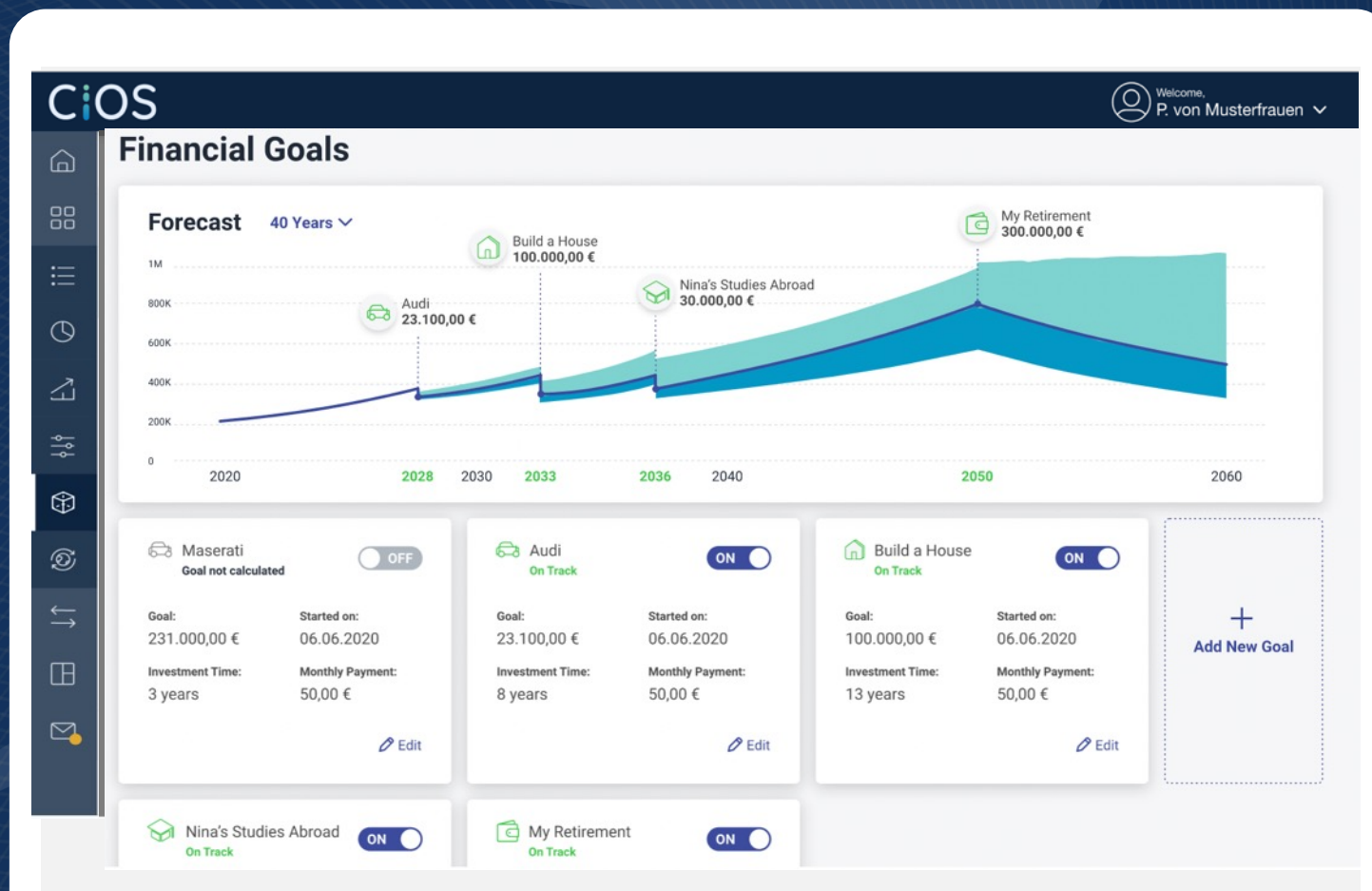
# Advice.

Fincite's Advice tools stand for adding real value to your advisory sessions by our unique composable software approach and state-of-the-art functionalities.

Investment.

Ordering.

Reporting.



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Onboarding.

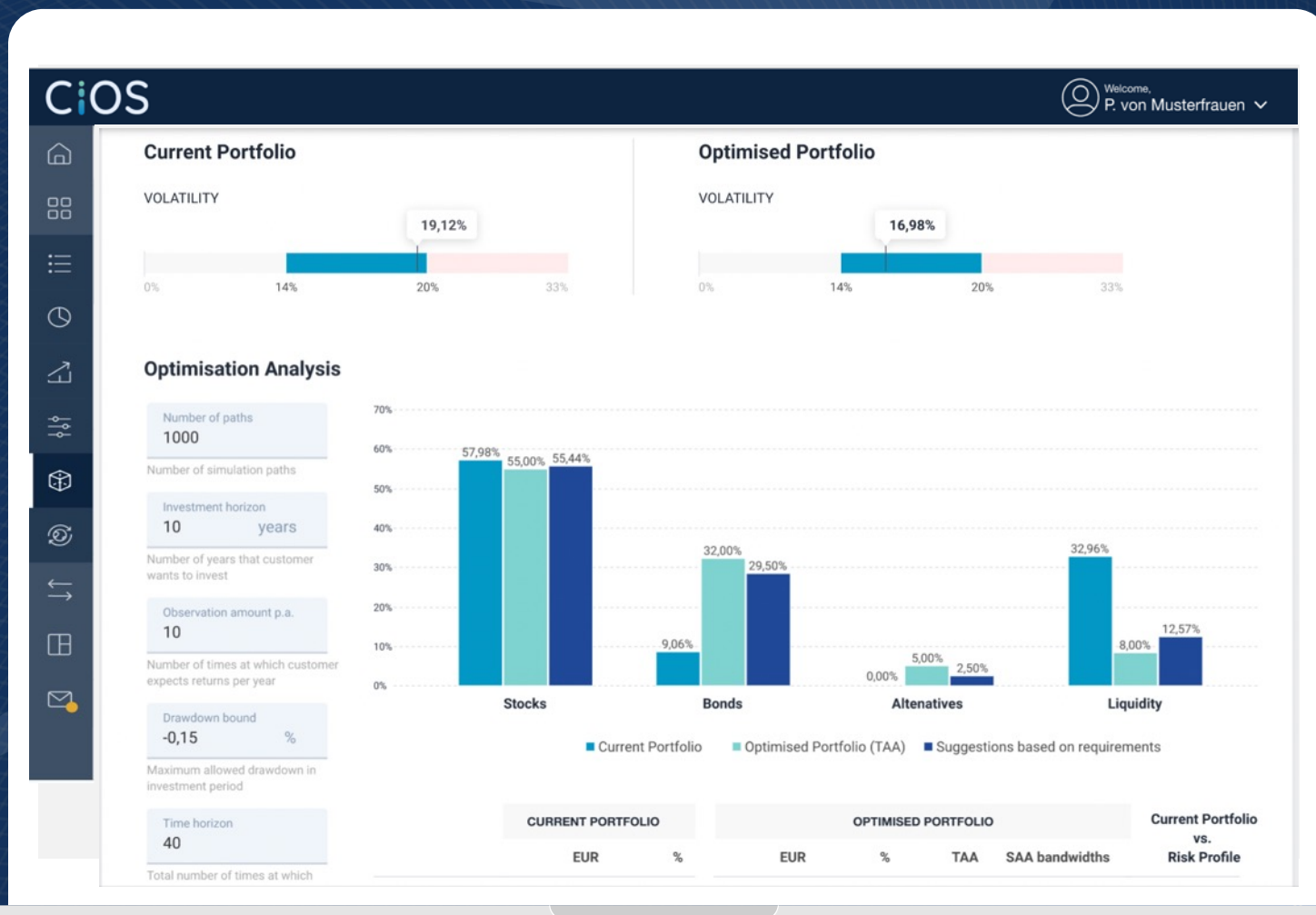
Advice.

# Investment.

Fincite's Investment capabilities give your portfolio managers, investment advisors and relationship managers the tools to save time and generate new business opportunities!

Ordering.

Reporting.



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Onboarding.

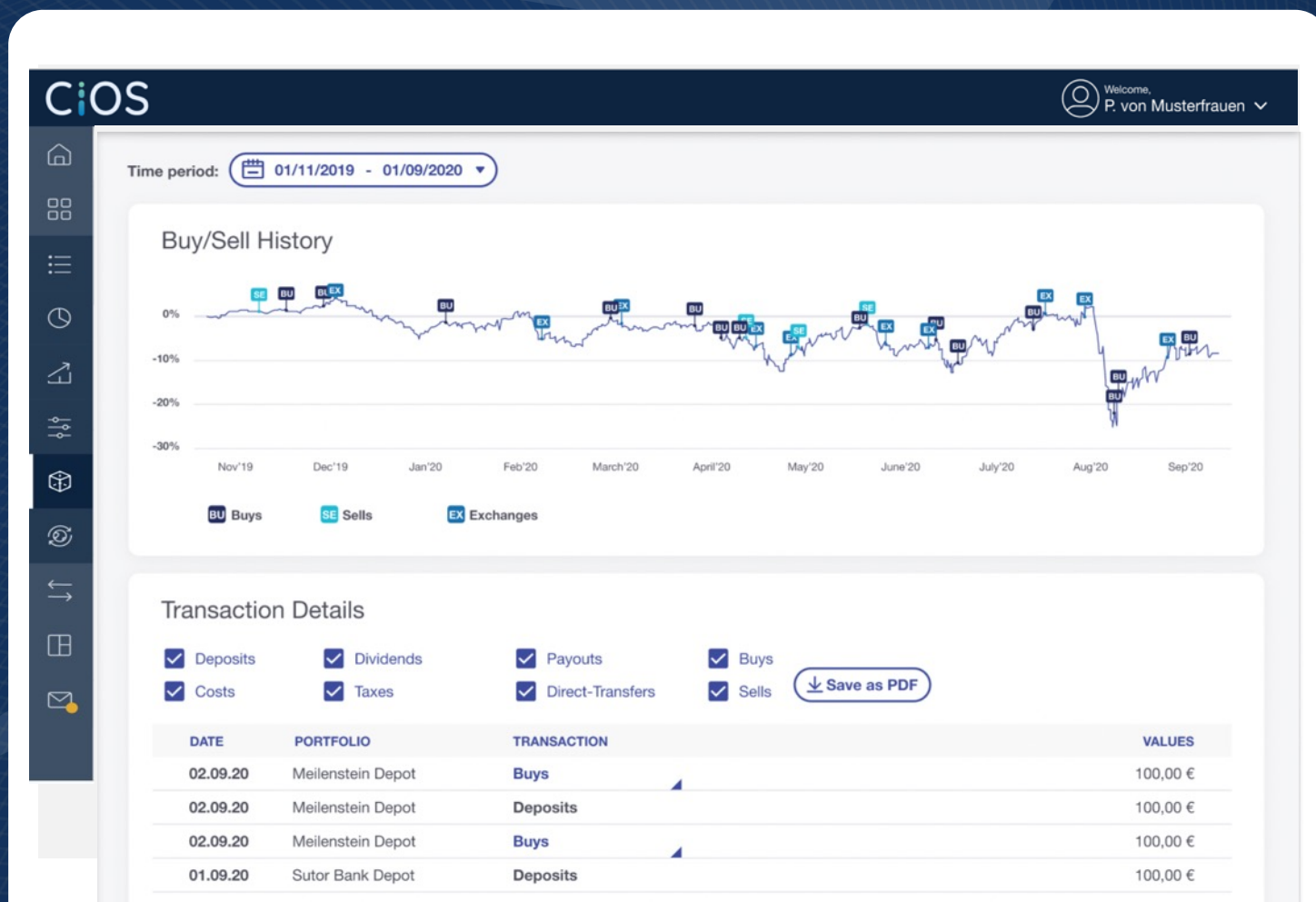
Advice.

Investment.

# Ordering.

Fincite's Ordering stands for state-of-the-art order management through a) custodian banks, b) FIX protocol or c) SWIFT protocols.

Reporting.



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Onboarding.

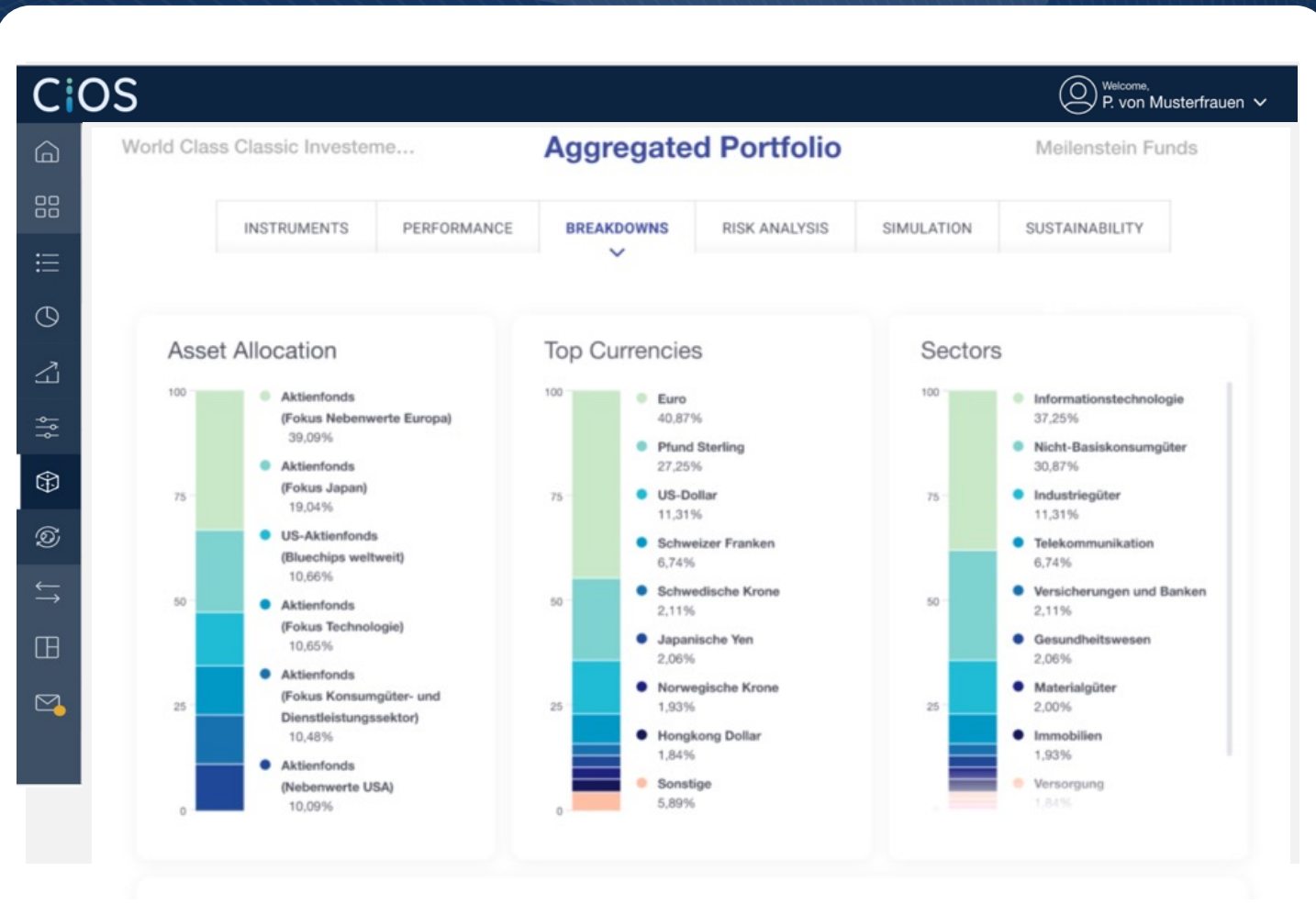
Advice.

Investment.

Ordering.

# Reporting.

Fincite's Reporting stands for gaining insights into the customer's entire financial situation – portfolio analysis at it's best as well as regulatory required PDFs.



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I empower people  
to make **intelligent financial**  
**decisions** worldwide