

# User journey overview

## Buying Process:

- Clients are offered a free account where they can start inputting non-bankable positions (private equity, collectibles, private positions)
- During this time, PrizmaDesk connects with the client's banks and integrates them into the system.
- The integration takes up to 10 days per new bank and is instant for banks already recognized by the system.



## Onboarding Process:

- After integration, clients begin a free trial period of up to a year.
- In this phase, clients start using the platform, receive guidance and training as needed, and can request custom feature development.

## Service Phase Interaction:

- Post-trial, a deep dive analysis of client fees is conducted to optimize costs.
- Clients begin paying a yearly subscription (0.03% of their AUM, with a minimum of 4k EUR and a maximum of 50k EUR).
- Ongoing premium support is provided, along with access to all features and custom feature development.