

Digital Wealth Management Platform

Unlock the true value of
wealth management

Most important characteristics at a glance

Internal organization	Risk management
Task management	Restriction violations
Workflow management	Drill-down on transaction level
CRM	Threshold examination
Prospect management	Management of policies
Contact report	Benchmark
Integrated onboarding	Data management
Process	Consolidation
KYC	Automatic rebalancing
Suitability test	Performance calculation
Dashboards	Comprehensive portfolio
Simulations	Analysis tool
Investment proposal	Portfolio master data
Appropriateness test	Reporting
Order management	Document management
Portfolio management	Access for end user possible
Pre-trade checks	FIDLEG/FINIG/MiFID II compatible
Transaction controls	

- > Quality
- > Speed
- > Flexibility
- > Cost efficiency
- > All-in-one

The platform operations will be completely taken over by Evolute. In principle, there are no additional hardware investments required on the wealth manager's side.