

WealthTech Advances & Services for the Independent Wealth Manager

Philipp Bisang, CEO Expersoft Systems

Expersoft Systems

The future of wealth management

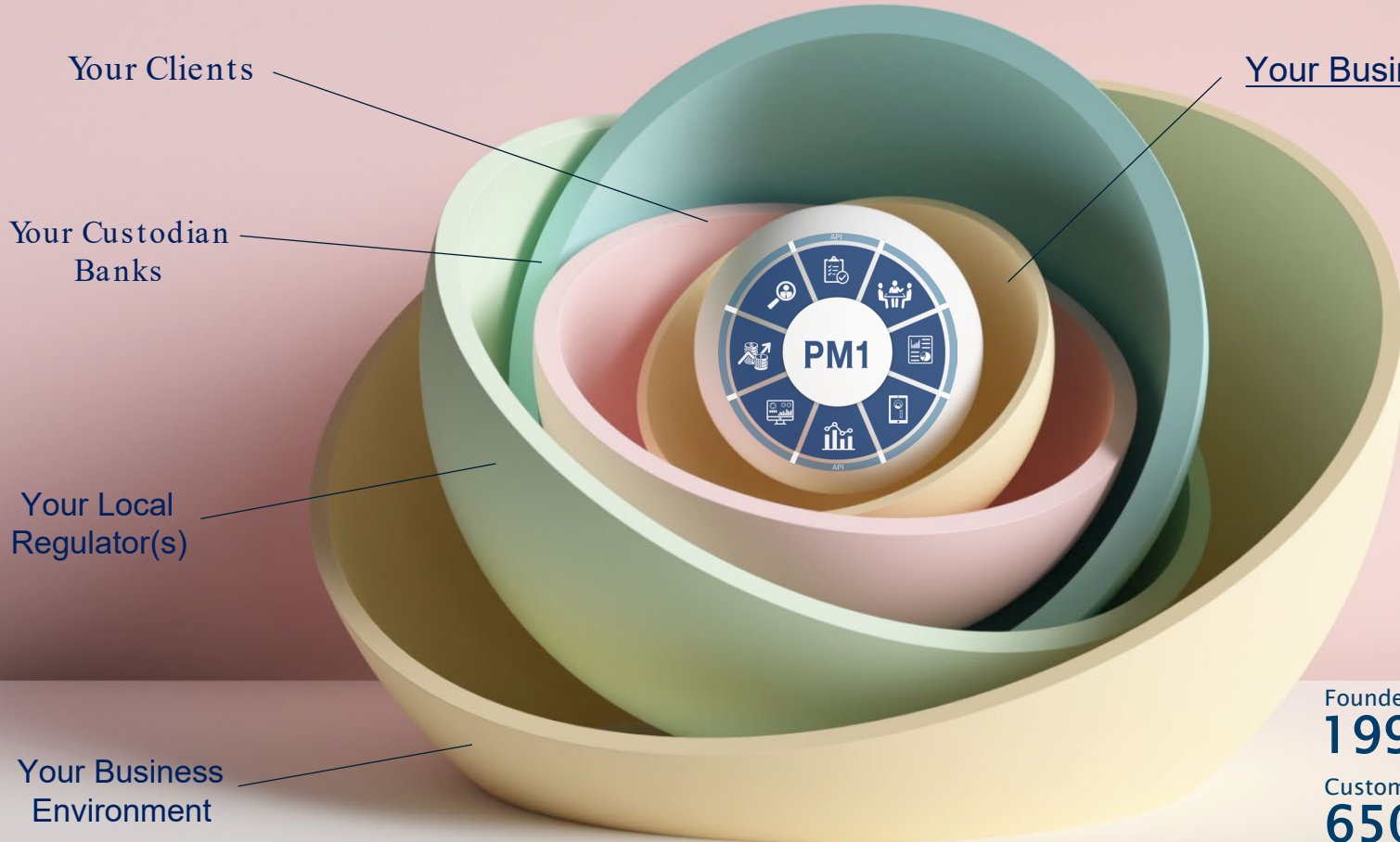


- **How can Banks help the IWM?**
 - High data quality
 - Wide coverage of transaction types and semantic in all different types of data
 - Support of ordering interfaces for STP
- **How can Software/Platform Providers help the IWM?**
 - Seamless bi -directional connectivity with custodians
 - Connected market data sources
 - Daily reconciliation and booking services
 - Outsourced system hosting and operations in SaaS model
 - Digitized solutions for different user roles and client classifications
 - Business flows supporting for regulatory requirements
- **Expersoft's View**

The Complex World of the Independent Wealth Manager



The Complex World of the Independent Wealth Manager



Your Business

EXPERTSOFT

- Digital Software
- API Connectivity
- Platforms
- Hosted SaaS
- Daily Reconciliation
- Local Support

The heartbeat of your business.

Founded in
1992

Customers
650

Management owned
100%

Operating countries
37

THANK YOU FOR YOUR ATTENTION

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