



E-BANKING

Web & Mobile
Client/EAM Portal



Optimize your client services through an integrated
web & mobile e-Banking Platform

FNZ is the **global platform provider** in the wealth management sector, partnering with over 650 of the world's leading financial institutions and over 8,000 wealth management firms.

With over 4,500 employees in 21 countries, FNZ's mission is to open-up wealth, empowering all people to create wealth through personal investment, aligned with things they care about the most, on their own terms.

At FNZ, we leverage our extensive experience in wealth management, **reinventing ourselves to innovate and adapt** to an industry in evolution and facing structural challenges:

-  Increased constraints on regulatory compliance,
-  Emerging of a new demographic customers profile,,
-  Client expectations for greater availability, transparency and modern digital communication channels,
-  Mosaic of disjointed legacy applications complexifying efficient customer relationship..

Our **award winning solutions** are made for private bankers and wealth managers to enable them to **turn these challenges into opportunities**.



**Digitize your business
with our web & mobile
Client/EAM portal**

FNZ e-Banking solution is part of the Banker's Front solution, which integrates two main functionalities: a CLM & Advisory Cockpit and a Client/EAM Portal (e-Banking).

These two features are both independent and complementary, and **you can either choose to implement one of them, or both.**



**Focus on Banker's Front:
an ideal combination**

Banker's Front is an innovative advanced digital Client Lifecycle Management (CLM) platform. It efficiently empowers banks, wealth managers and investment managers to manage a successful digital transformation journey:

- **Improve the users experience and productivity** and focus on **value-added business activities** with a single client-centered intuitive solution covering all steps of the client relationship cycle.
- **Increase revenue** by capturing and retaining business opportunities with a better management of your client relationships.

- Combine powerful **specialized wealth management** digital solutions at **your own pace and with your own specificities.**
- Offer your clients **an enhanced customer experience** via digital innovative solutions, without reducing the value of the trusted and personalized relationship between the client and his banker.

If you are interested in knowing more about our Banker's Front solution, please request the brochure or download it from our website 'Client Lifecycle Management' section .

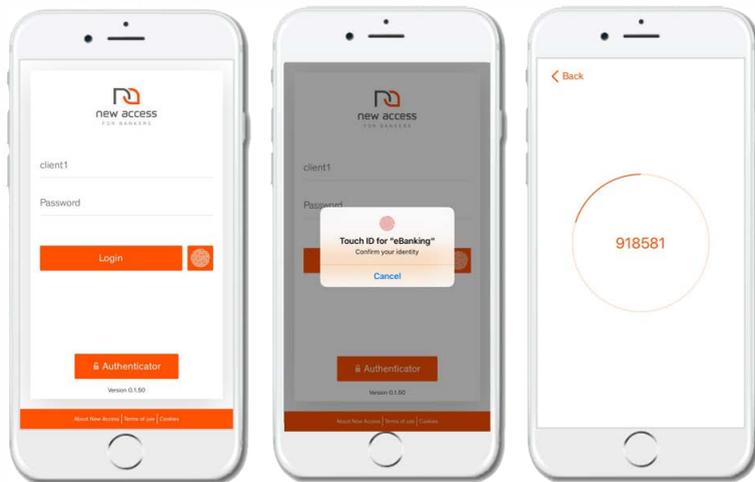
The e-Banking solution

FNZ **e-Banking** solution offers a powerful user experience with full digital availability for the final HNW client or external asset manager:

- Consult information such as asset allocation, performance, positions and movements ;
- Receive and share documents and investment proposals ;
- Generate high-end reports on-demand ;
- Place orders with the appropriate pre-trade controls and restrictions ;

- Easily interact with the relationship or investment manager through secured messaging chat.

The client/EAM portal provides a similar and shared digital experience between the banker and his clients: assets, performance, reports, and client data come from the same source and are presented in a similar way. Available through desktop or mobile applications.



Key benefits

- **Customizable:** the e-banking platform is fully customizable to the bank's needs with the bank's visual identity & multi language ;
- **Omni-channel communication:** the solution allows a multi-channel communication between the bank and its clients, including secured live messaging, documents workflow and e-signature ;
- **Responsive:** FNZ e-Banking solution is accessible through all devices (desktop, tablet & mobile) ;
- **Shared data:** a single set of data available at any query level for both clients and advisors, and in real time.
- **Secured platform:** fully protected application with a secured system and access via biometrics (fingerprints/face ID) or FNZ token.

Integration

The solution uses a dedicated layer that has been designed to be **integrated with any core banking system** in real-time with feeds from depository banks in a multi-custodian approach.

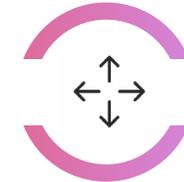
It can integrate data coming from various sources regardless of content and format.



Connectivity to any core banking systems



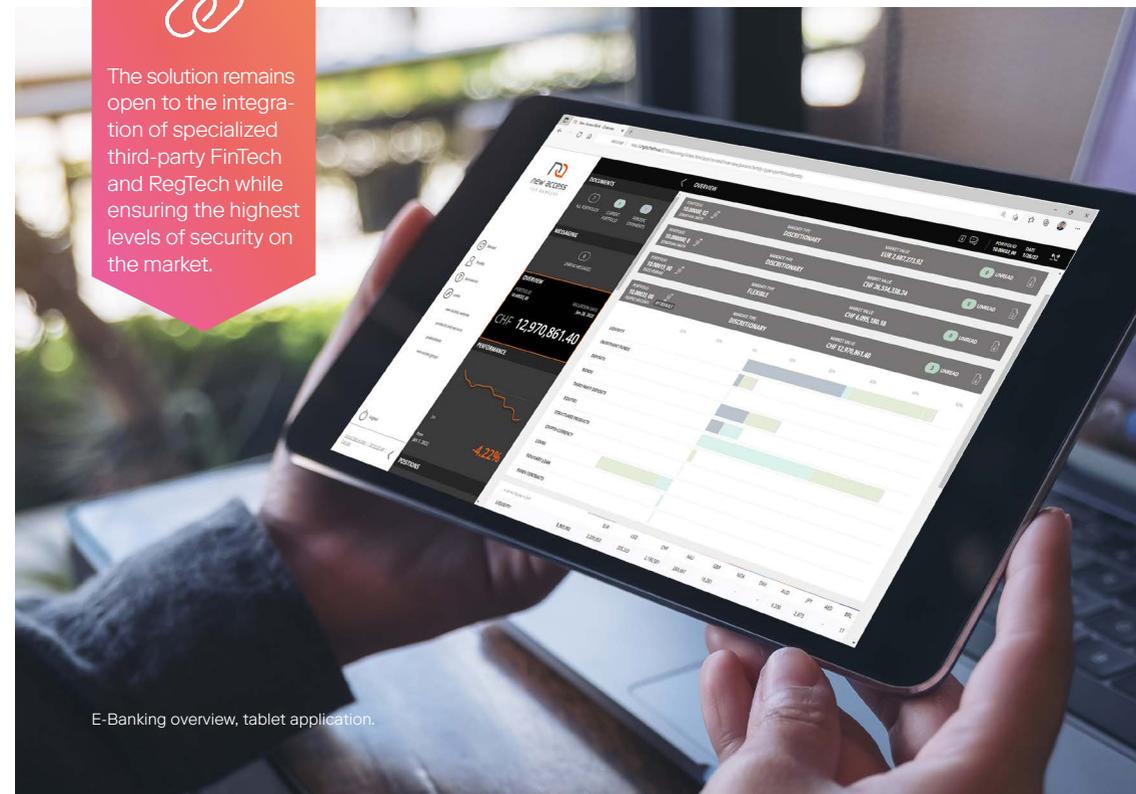
FNZ solutions standard APIs



Open to third-party vendors



The solution remains open to the integration of specialized third-party FinTech and RegTech while ensuring the highest levels of security on the market.



E-Banking overview, tablet application.

A digital platform fully adaptable to your branding and visual identity



E-Banking performance overview (mobile application left page, tablet application right page).

E-Banking key features



Integrated platform

- Document sharing between the banker and the client
- Live secured chat with the possibility to share documents and investment proposals
- Secured access
- E-signature (optional)
- Complementary within FNZ Banker's Front and fully synchronized with the CLM and Advisory Cockpit with same data source



Portfolio consultation

- Dynamic portfolio consultation
- Performance
- Asset allocation, positions and movements
- Market information (rates, prices...)
- Live report generation and data export
- EAM (External Asset Manager) features including portfolio consolidation



Orders Management

- Cash payments
- Security orders
- Real-time compliance checks and pre-trade restrictions
- Global orders for External Asset Managers



Enhanced digital experience

- Design responsive
- Available through web or mobile apps (IOS and Android)
- Ergonomic and easy to use
- Multi-language with a fully customizable design to match your visual identity and branding





Request a demonstration, ask a question
or book a call, we are available for you:

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Always by your side, we serve
our + 650 clients in more than
21 countries





Wealth's growth platform

[FNZ.com](https://fnz.com)