



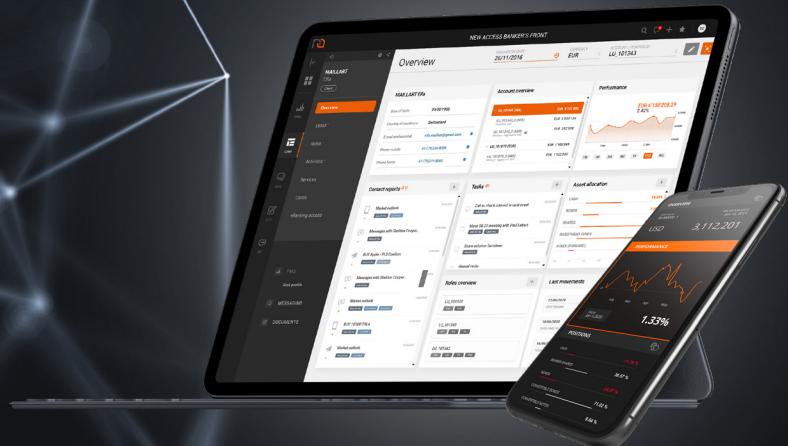
# new access

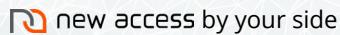
## BANKER'S FRONT

Client Lifecycle Management Digital Platform



Optimize your client services and regulatory compliance to increase your revenue margin





New Access provides **scalable and modular Core-to-digital solutions** designed to meet the specific requirements of the private banking and wealth management industries.

20 years of track record, supporting more than 60 clients (private banks, wealth and asset managers and securities services) have allowed us to evolve and perfectly address the industry challenges and needs.

At **New Access**, 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,



Constant margin erosion,



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**.

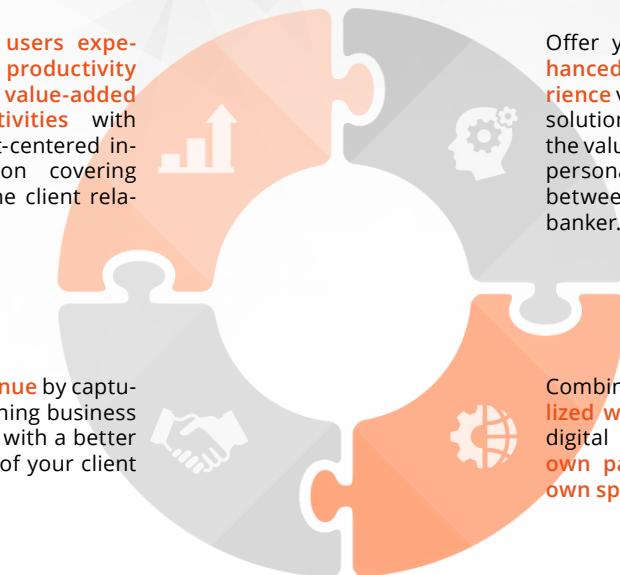




Digitize and grow your business with our New Access Banker's Front solution

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.



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.

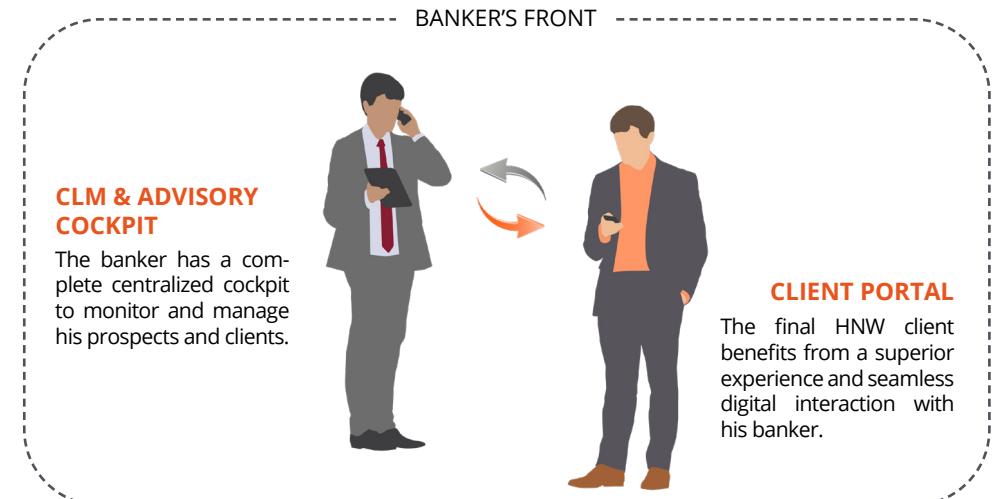
Increase revenue by capturing and retaining business opportunities with a better management of your client relationships.

Combine powerful **specialized wealth management** digital solutions at **your own pace and with your own specificities**.

## +

### New Access solution

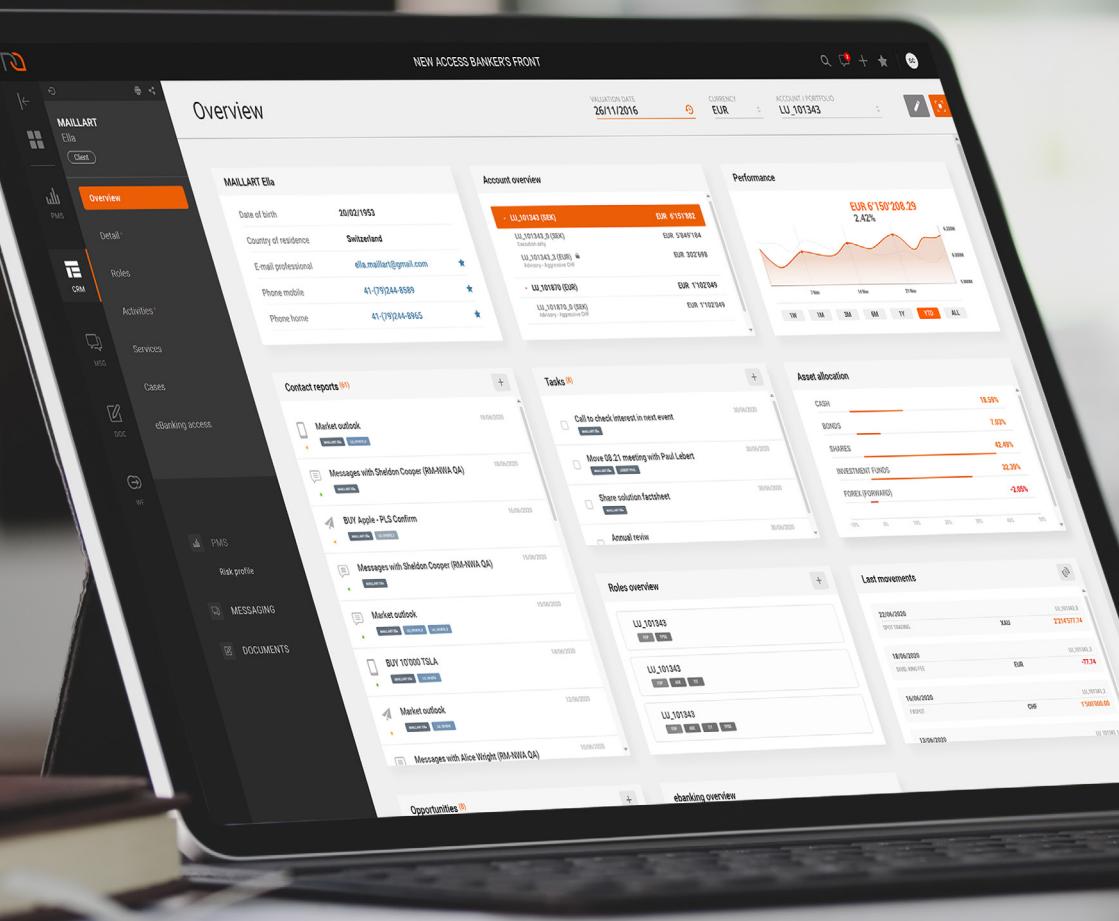
Banker's Front solution integrates two main functionalities: a **CLM & Advisory Cockpit** and a **Client Portal**. These two features are both independent and complementary, and **you can either choose to implement one of them, or both**.



## The Banker's Front solution



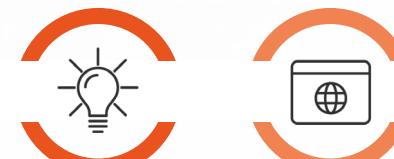
A single platform combining a 360° view of clients and assets with advanced CLM capabilities



### + CLM & Advisory cockpit

The solution covers all business and regulatory compliance needs on a single, modern and user intuitive digital front-end solution.

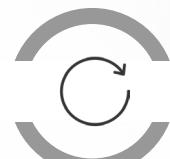
The relationship manager has a 360° vision on his clients from a CRM\* perspective including document management, asset & holdings, investment proposals and can even place orders. It's a unique and consistent interface for the wealth manager that integrates all the processes involving client interaction.



Intuitive digital front-end

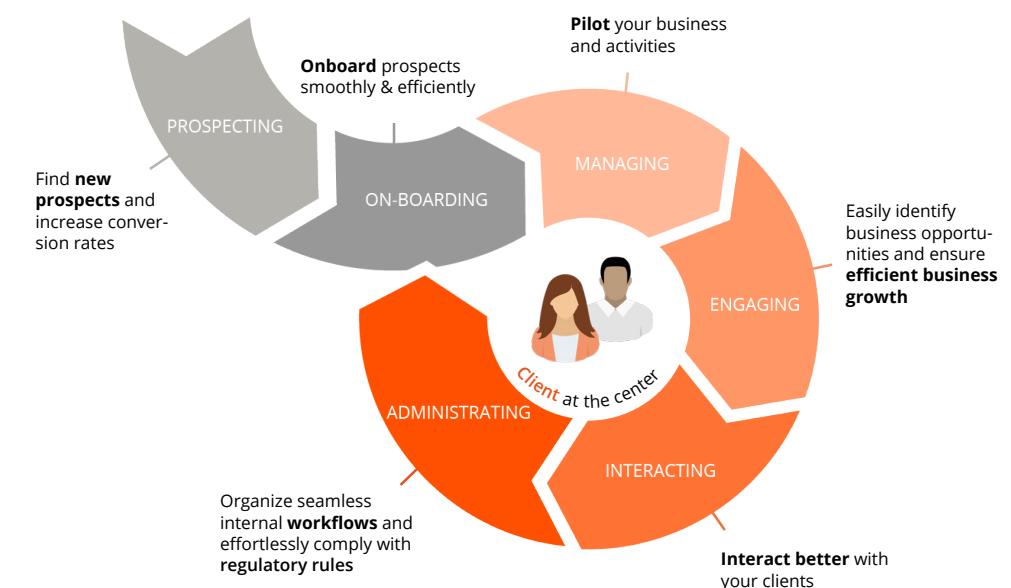


Unique interface



Entire CLM

The solution is covering the **entire Client Lifecycle Management** from prospect management to client relationship management:



An **integrated experience where key processes** between different roles in the organization and between the relationship manager and his clients are **digitalized and efficient**.



A digital platform fully adaptable to your branding and visual identity



## +

### The Web and Mobile Client Portal

The **client portal** offers a powerful user experience with full digital availability for the final HNW client or external asset manager:

- Consult information (complete e-Banking with asset allocation, performance, positions, 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.



**Banker's Front client 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.*

## Integration

The Banker's Front solution uses a segregated database 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.



Generic connectors to the main market Core banking systems



Application's standard APIs



Standard integrator extract program

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

## Banker's Front key features

### + CLM & Advisory Cockpit



A comprehensive digital solution that can be deployed with modular functionalities at your own pace



#### Workstation



#### Relationship management



- Widget and role-based dashboard
- 360° client or asset centric view
- Performance and asset allocation
- Portfolio consolidation
- Orders (cash and securities)
- Investment proposals

#### Relationship management

- Prospect management
- Client management (financial planning and wealth information, clients' connections)
- Contact management (events, contact reports, tasks)
- Opportunities management (pipeline, client's evolution and concerns)

#### Onboarding & regulatory



- Full workflow from prospect to client onboarding, customized according to the bank's policy
- KYC & AML risk
- Investor's profile (incl. MiFID II, LSFIN, suitability and appropriateness requirements)
- Support of multi-jurisdiction and various client structures (individual, corporate, trust, etc.)
- Client information review
- Restrictions and alerts

#### Documents & workflows



- Secured document management
- E-signature
- Banking processes and workflows
- Collaborative virtual rooms



### + Client Portal



#### Integrated platform

- Fully synchronized with the CLM and Advisory Cockpit with same data source
- Document sharing between the banker and the client
- Live secured chat with the possibility to share documents and investment proposals



#### 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



#### Portfolio consultation

- Dynamic portfolio consultation
- Performance
- Asset allocation, positions and movements
- Market information (rates, prices...)
- Report generation and data export
- External asset manager features including portfolio consolidation



#### Orders

- Cash payments
- Security orders
- Real-time compliance checks and pre-trade restrictions
- Global orders for external asset managers



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

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More information on our website: [www.newaccess.ch](http://www.newaccess.ch)



Always by your side, we serve our + 60 clients  
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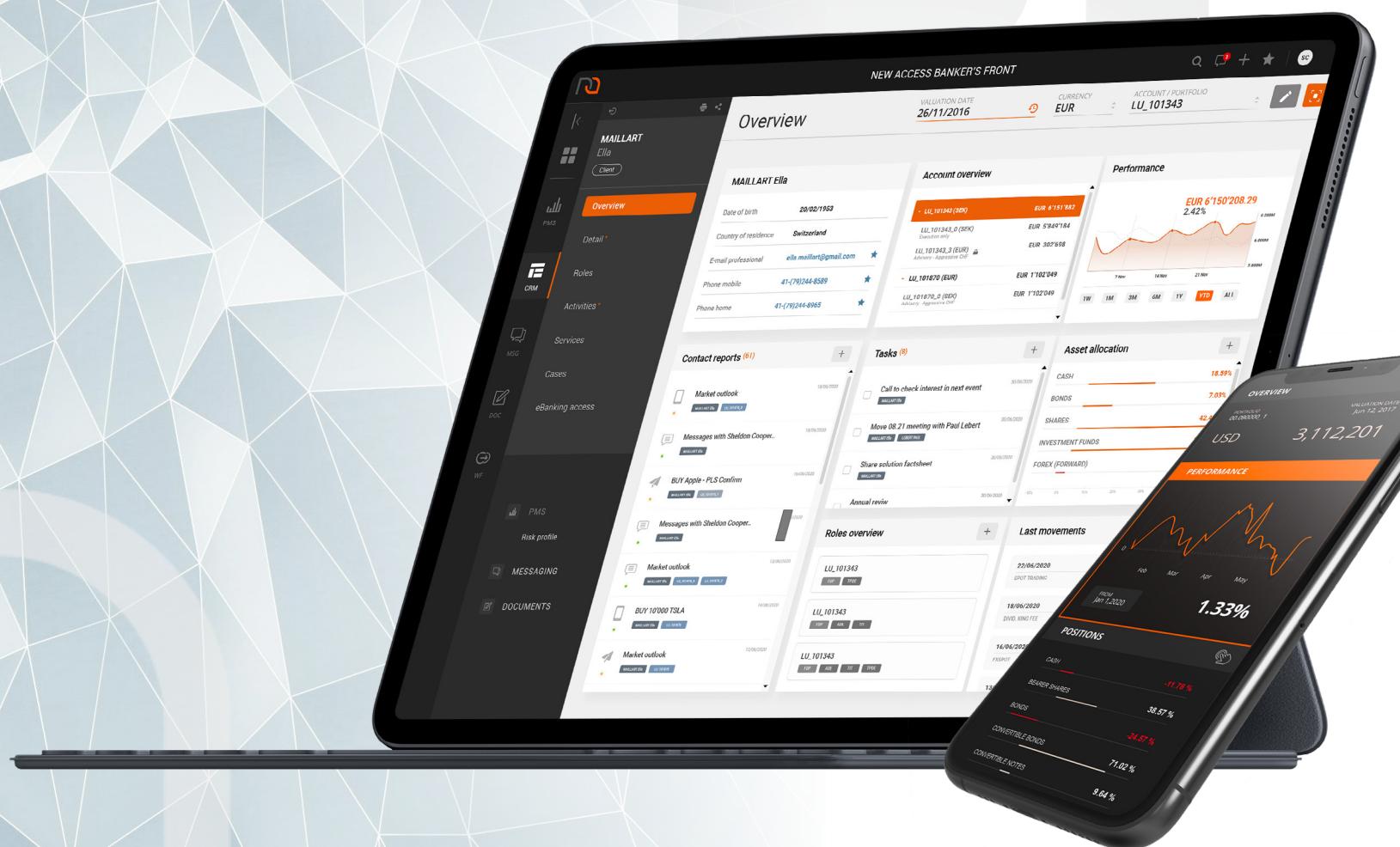
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Core-to-digital Solutions  
for Private Banking & Wealth Management