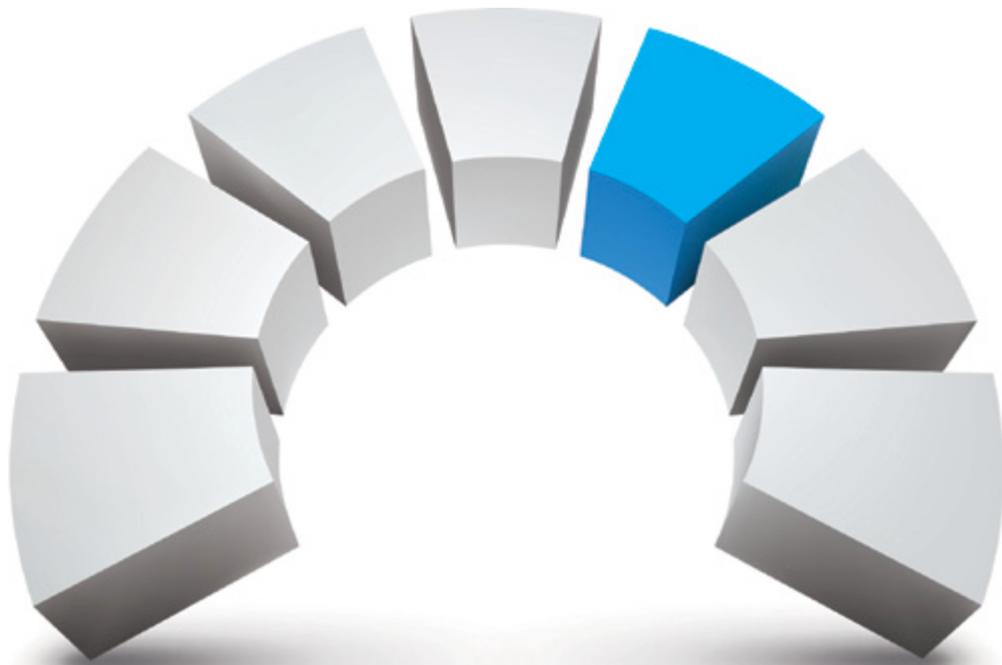


AGILITY FOR
HIGH-PERFORMING
WEALTH MANAGEMENT OPERATIONS



> The Challenge

Today's wealth management firms face **continued change in industry structure**, in domestic and international **taxation, legislation** and **regulations** as well as the application of **disruptive business models**, the introduction of **innovative services** and **increased client expectations**. The impact of accelerating change is expected to be higher on **independent wealth managers (IWMs)** that are called to make strategic decisions in order to safeguard their current business and grow.

At the same time, **increased global competition** demands the **delivery of modern tools** to their staff and enhanced digital services to their clientele, whilst minimising costs through economies of scope, economies of scale and by streamlining and automating operational processes.

> The Solution

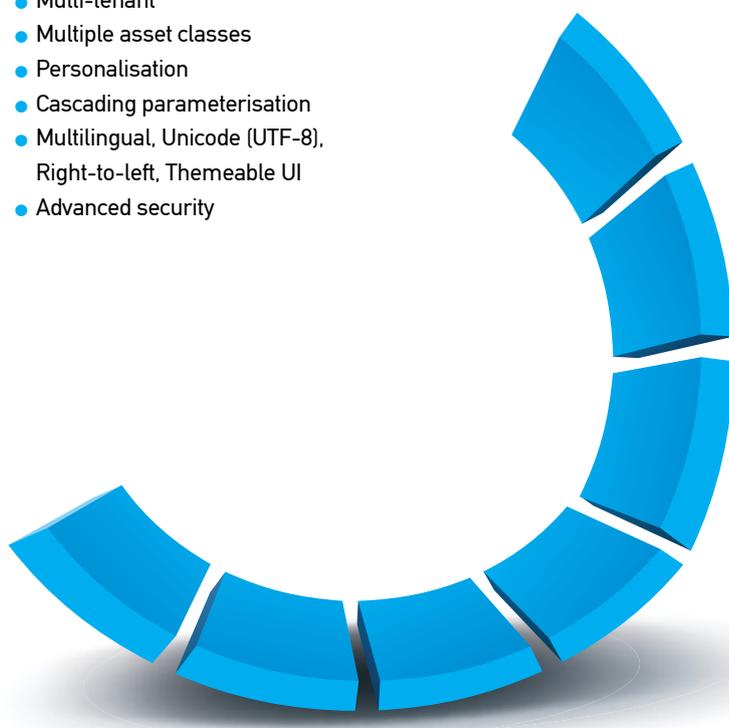
Such a changing and competitive business environment requires the **strategic ability** to evolve, proactively adopt and effectively respond to changes in the market. In other words, to have the **agility** to support the implementation of any corporate - or business - level strategic plan. Profile Software's brand-new, secure, web-based, front-to-back office wealth management solution, **Axia**, that can also be offered as a **white-labelled service (SaaS)** in a private cloud, aims to offer agility through its alternative configurations:

- As a **multi-custodian bank model** for IWMs, (Multi-) Family Offices and HNWIs
- As an **external IWMs' network platform** of a Wealth Management firm or a Bank
- As a modern, **digital Front-Office solution** for a Bank's or Wealth Management firm's professionals and clients, including **Client Onboarding** functionality

Axia, developed by Profile Software, is the brand-new Wealth Management solution which is also available in a Private Cloud (SaaS).

> Key Features

- Dashboard
- Client Relationship Management
- Client onboarding
- Financial planning
- Compliance
- Document management
- Transaction capture & entry
- Position keeping
- Portfolio evaluation
- Multi-dimensional portfolio analysis
- Asset allocation/Investment strategies
- Rebalancing
- Profitability analysis
- Performance analytics
- Risk analytics
- Trade order management
- Fees management
- Internally & externally managed assets
- Consolidated client reporting
- Management reporting
- Automated integration
- Multi-tenant
- Multiple asset classes
- Personalisation
- Cascading parameterisation
- Multilingual, Unicode (UTF-8), Right-to-left, Themeable UI
- Advanced security



> What makes Axia different?

- Axia provides **business agility** through a **quick setup process**, a variety of **alternative deployment options** (on-premises or hosted in a Data Centre), through **alternative sourcing options** (for IT and/or business processes outsourcing – ITO / BPO), while offering **flexible licensing** and **cost-effective pricing** options (e.g. pay-as-you-use or pay-as-you-grow)
- Capitalising on Profile Software's extensive industry experience in the financial services sector, Wealth Management organisations can benefit from Axia's **rich functionality** and **unique features**, ensuring that regulatory, operational and client service concerns are successfully addressed
- Axia is a **web-based, omni-channel application** with a **mobile-first, responsive user interface design**, that allows **secure access** to portfolios' data, analytics and documents from anywhere, at anytime and offers a common user experience from any device (desktop computer, tablet or smartphone)

Axia offers secure 24/7 access to all wealth management professionals and their clients, to portfolios' data, analytics and documents, from anywhere and any device.



> Benefits

- **Affordable, first-class, enterprise-wide solution** meeting diverse needs
- **Unparalleled client service experience**
- All the functionality needed in a **single, fully integrated platform**
- **Save time of limited and valuable resources** by streamlining processes
- **Automated integration** with custodians and market providers
- **Unique flexibility** (from configuration, to deployment, to pricing options)
- **Fast time-to-market** with short setup process
- Always available from anywhere at anytime

Professional Services >

Profile Software delivers Professional Services to its clients which are included in its **turn-key solution** proposition to completely cover their requirements, from **project commencement to go-live**. These Professional Services cover both the Implementation (Project Management, Customisation, Consulting, Training) and Post-implementation phases (Customer & Technical Support, Maintenance, Consulting). Profile Software also offers additional **Business Process Outsourcing (BPO)** services or **Business Process as a Service (BPaaS)**.

Profile Software, an ISO-certified and listed company, is a specialised financial solutions provider, with offices in **Geneva, Dubai, London, Singapore, Athens** and **Nicosia**. It delivers market-proven solutions, with an exceptional track record of successful implementations, to the Banking and Investment Management industries.

10,000
Users

600
Sites

20
Countries



Profile Software is acknowledged as an established and trusted partner across many regions, offering a wide spectrum of solutions to the financial services sector. Profile Software's solutions are recognised and approved by leading advisory firms and enable Institutions worldwide to align their business and IT strategies while providing the necessary business agility to proactively respond to the ever-changing market conditions.