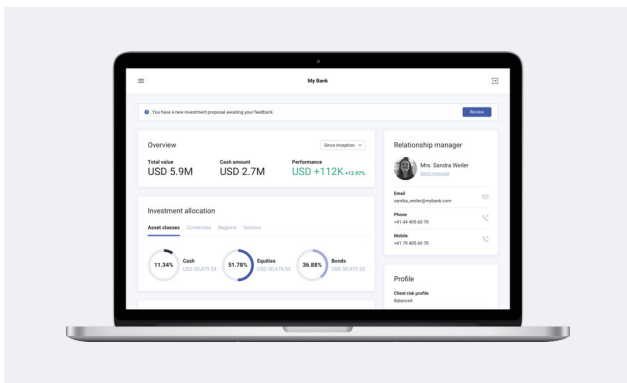


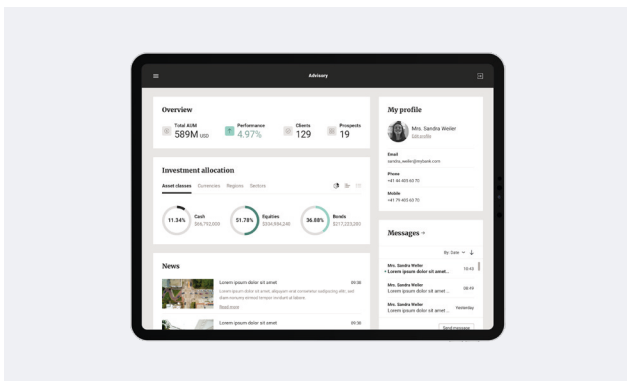
DFS.Hybrid Wealth Manager Factsheet

Engage, manage and grow your clients with the #1 Swiss omni-channel Wealth Management platform – cloud-based, fully integrated, out-of-the-box, at lowest cost.



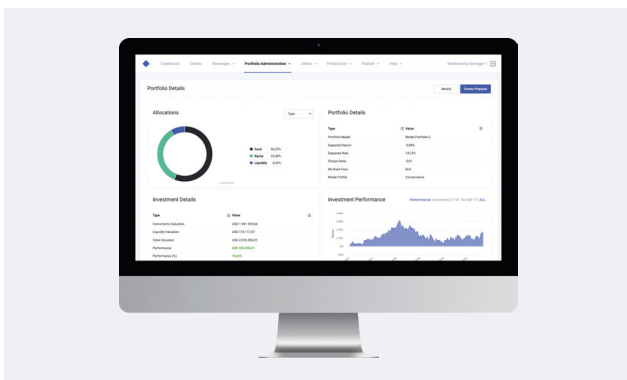
Client Cockpit – Client Only

- Digital wealth solution with client self-service capabilities
- Automatically generated insights and proposals
- Real-time interaction with advisor



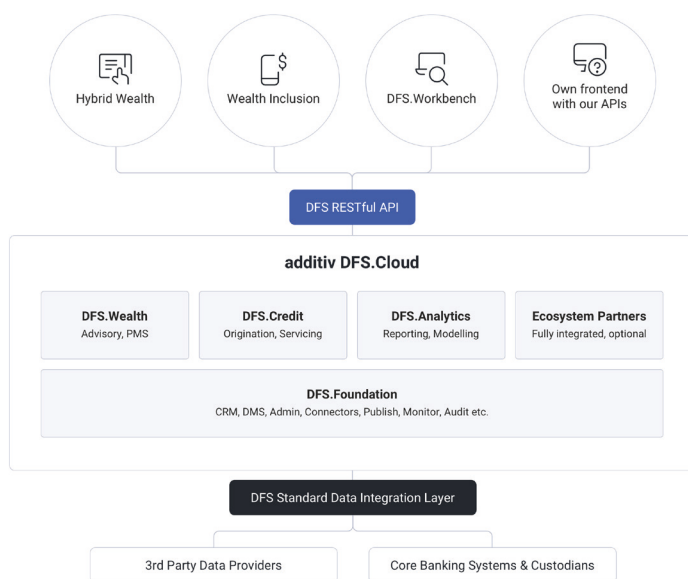
Mobile Advisor – Advisor with Client

- Real-time, in-person collaboration between client and advisor
- On-the-go advisor tool to cover 80% of all use cases
- Secure content sharing and communication



Workbench – Advisor and Portfolio Manager

- Integrated CRM and Portfolio Management System
- Full set of all available features
- Orchestration hub for all activities and channels



DFS Platform – Comprehensive Business Logic Suite with a wide range of preconfigured use cases

Technology

- Service-oriented, modular and open architecture
- RESTful API that speaks the business domain language
- Developed using proven technologies for enterprises such as .NET, Azure SQL and NoSQL
- Freedom of UI technology – responsive and intuitive front-end web apps built with JS React or build your own apps; all work on the same stateless APIs
- Simplified integration through standard API layer & domain-driven, event-based, messaging

Security by Design

- Authentication – Strong / multi factor authentication utilizing (among others) signed tokens such as JWT
- Sensitive data protection – Full data encryption in rest and transit using technologies such as Azure SQL “Transparent Data Encryption (TDE)” and one-way unique random salts for secrets
- Secure services – DFS Cloud is leveraging from Azure’s proven world-class degree of application compliance and data security

Benefits

Match your clients’ expectations.

Makes you omni-channel. Extended offering and one-stop shop.

Deliver results. Generate higher revenues. Solve cost issues.

Drive top-line growth. Manage end-to-end operational efficiency at lower cost.

Own a flexible operating and sourcing model.

Best-practice blueprint. Fits into existing setup. Flexible additions for differentiation. Access to well-known ecosystem partners.

Leverage proven additiv DFS® Cloud as “system of intelligence”.

Orchestration of Finance-as-a-Service value chain. Fully managed, end-to-end Microsoft Azure PaaS offering.