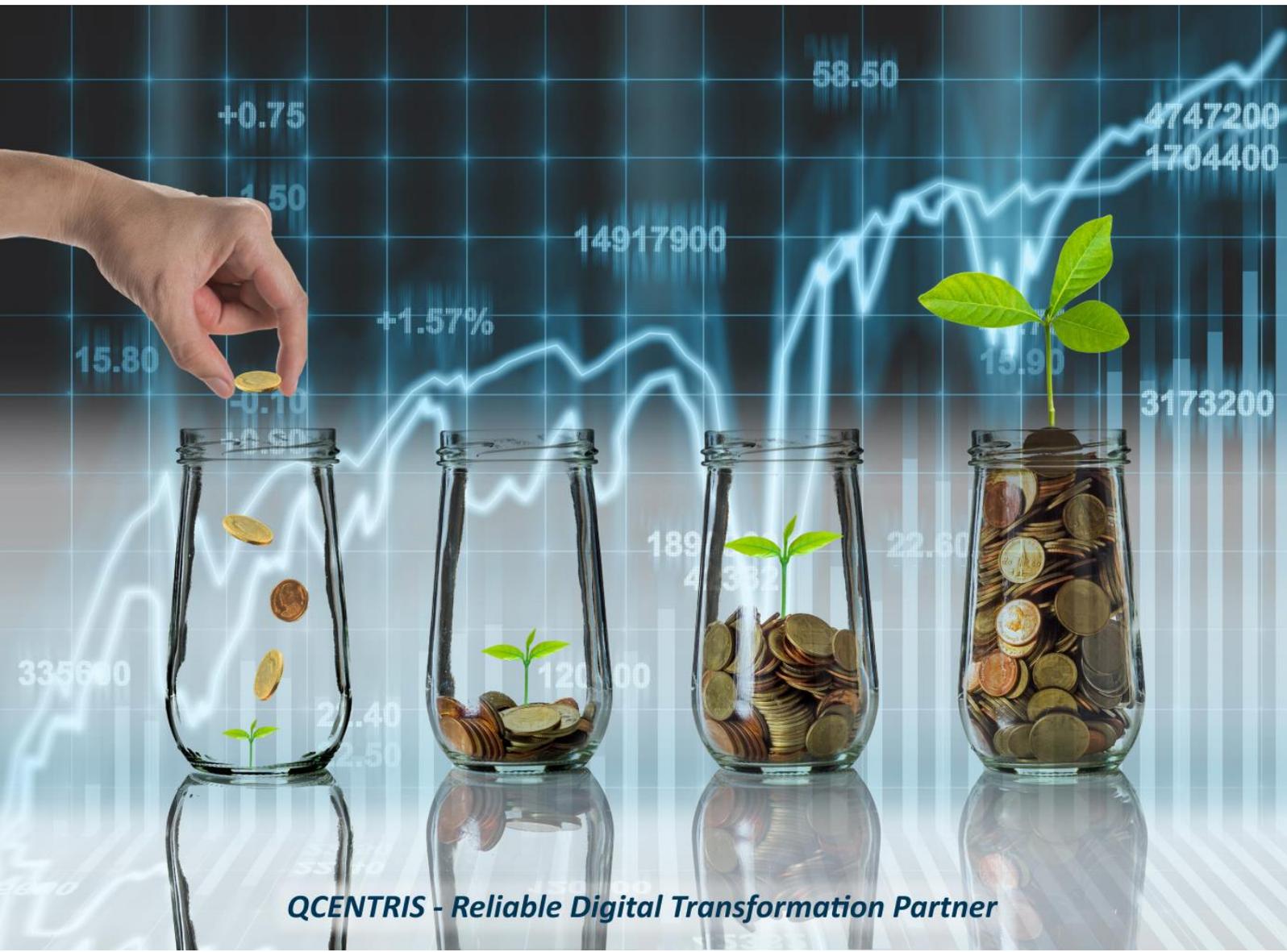


# Wealth Management Service Capabilities

*with additiv KickStarter™ - Hybrid Wealth Manager*



## Rapid, risk-free route to digital wealth management

With *KickStarter™* you can transform your wealth business in under 3 months. Available in the cloud, *KickStarter's™* integrated SaaS deployment package provides the building blocks for unprecedented rapid delivery. Now you can gain a real advantage at a time when you need it most. Quickly and at low cost.

Underpinned by additiv's award-winning DFS System of Intelligence, *KickStarter™* allows you to easily access the most advanced, digital solutions available within the wealth industry.

Implement additiv's *Hybrid Wealth Manager* through *KickStarter™* for an optimum digital customer experience; offering self-service, in person or a hybrid of the two.

<http://additiv.com/kickstarter/>

additiv

## Seamless managed implementation

Implementations can be a challenge. To gain the true value offered by additiv *KickStarter™ - Hybrid Wealth Manager*, you need a robust implementation partner. QCENTRIS's approach to delivery ensures a smooth transition.

Having worked with additiv for many years, we have a unique perspective when it comes to understanding additiv's client's preferences and financial advice needs, while recognizing which operational models will best address their evolving demands.

### All the ingredients, expertise and experience for success

**A collaborative approach:** our delivery process starts with an 'all-hands' kick-off meeting, where we define and agree the overall goals and a detailed timeline.

**Dedicated support:** we assign a dedicated QCENTRIS project manager to coordinate your end-to-end implementation. This project manager oversees the initial installation and configuration of your additiv solution and will be your key contact person on the ground.

**Full data migration:** we'll manage the entire lifecycle of your data migration where required including any integration, to ensure that you are fully operational following your additiv *KickStarter™ - Hybrid Wealth Manager* fast track implementation. Whether you are converting data from another platform including custodian, market data, client data or financial data, we'll ensure a smooth, error-free result.

**Complete end-to-end digital transformation:** we're with you throughout the process; from initial concept to assessment and holistic strategy to implementation, operational readiness and ongoing maintenance.

## additiv KickStarter™ - Hybrid Wealth Manager



### No risk

- Cancel at any time
- Safe implementation approach
- Highly scalable solution used by largest global organizations
- Fully tested
- Fully compliant, highest IT security standards



### Low Cost

- No capex costs
- Free implementation
- Free customization
- Only pay full SaaS fee when live
- Initial data load included



### Increased Value & Profit

- Revenue growth through advanced targeting and servicing functionality
- Much lower operating costs through high automation and self-services
- Ability to operate a platform model for sourcing third-party service



### Ready Solution

- Several out-of-the-box use cases supported
- 3 month or less implementation
- SaaS deployment & easy configuration
- Enterprise ready
- Integration ready

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## Managed custom development

Software development and quality Assurance around financial services is our DNA. We implement additiv **KickStarter™ - Hybrid Wealth Manager** tailored to suit your Wealth Management needs.

Our business and technical expertise enables us to listen to your business needs and customize according to your strategy including:

- ✓ customer on-boarding journey,
- ✓ custom custodian API interfaces,
- ✓ market data API interfaces,
- ✓ trading platform interfaces,
- ✓ any Front-End Portal development

### A la carte API integrations or REST APIs is what we do

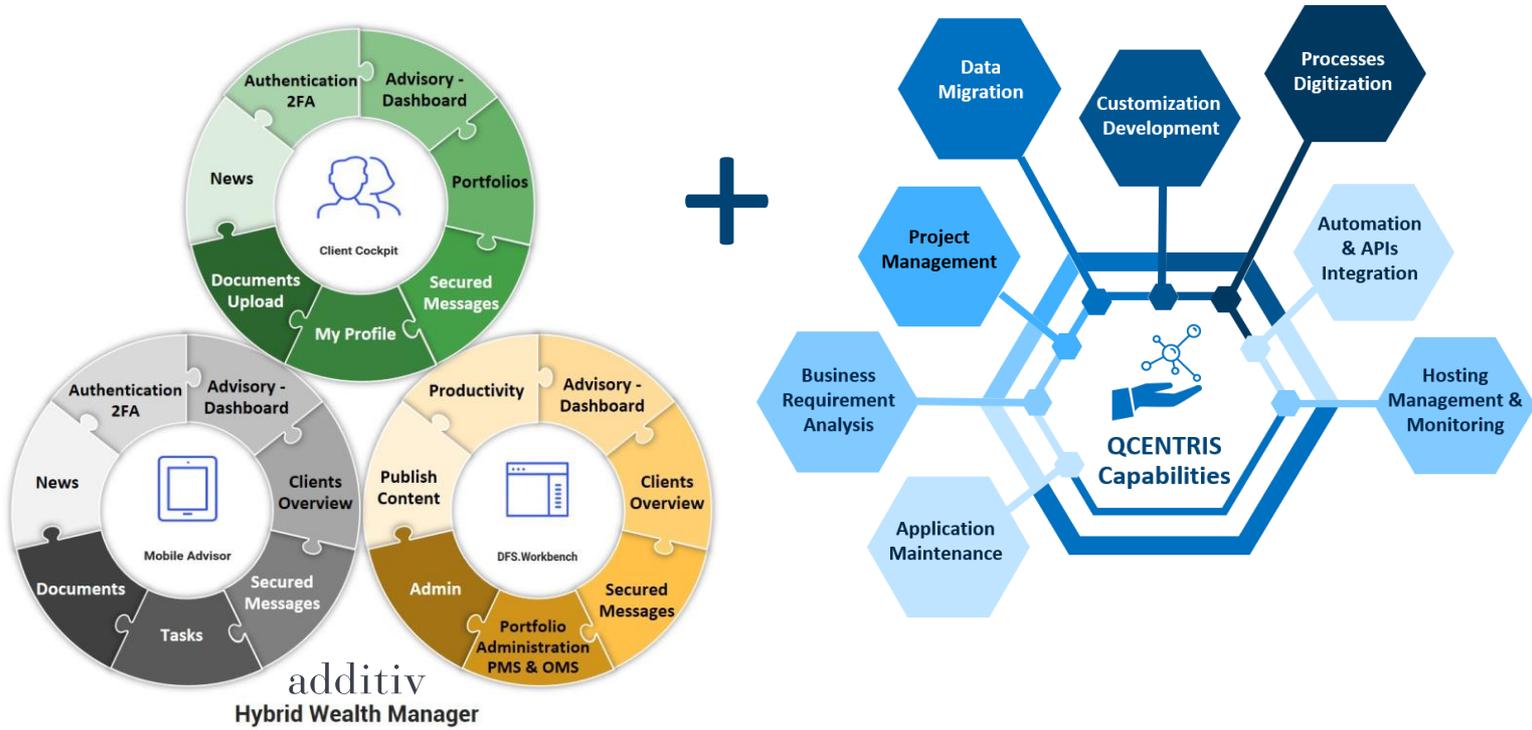
We master the domain of middleware integration tools built to tie together your different software applications. We build a standardized wrapper to help your API-enabled applications successfully communicate with your online/batch providers to make data requests. All our integration solutions incorporate the security standards.

### Tailored delivery to your needs

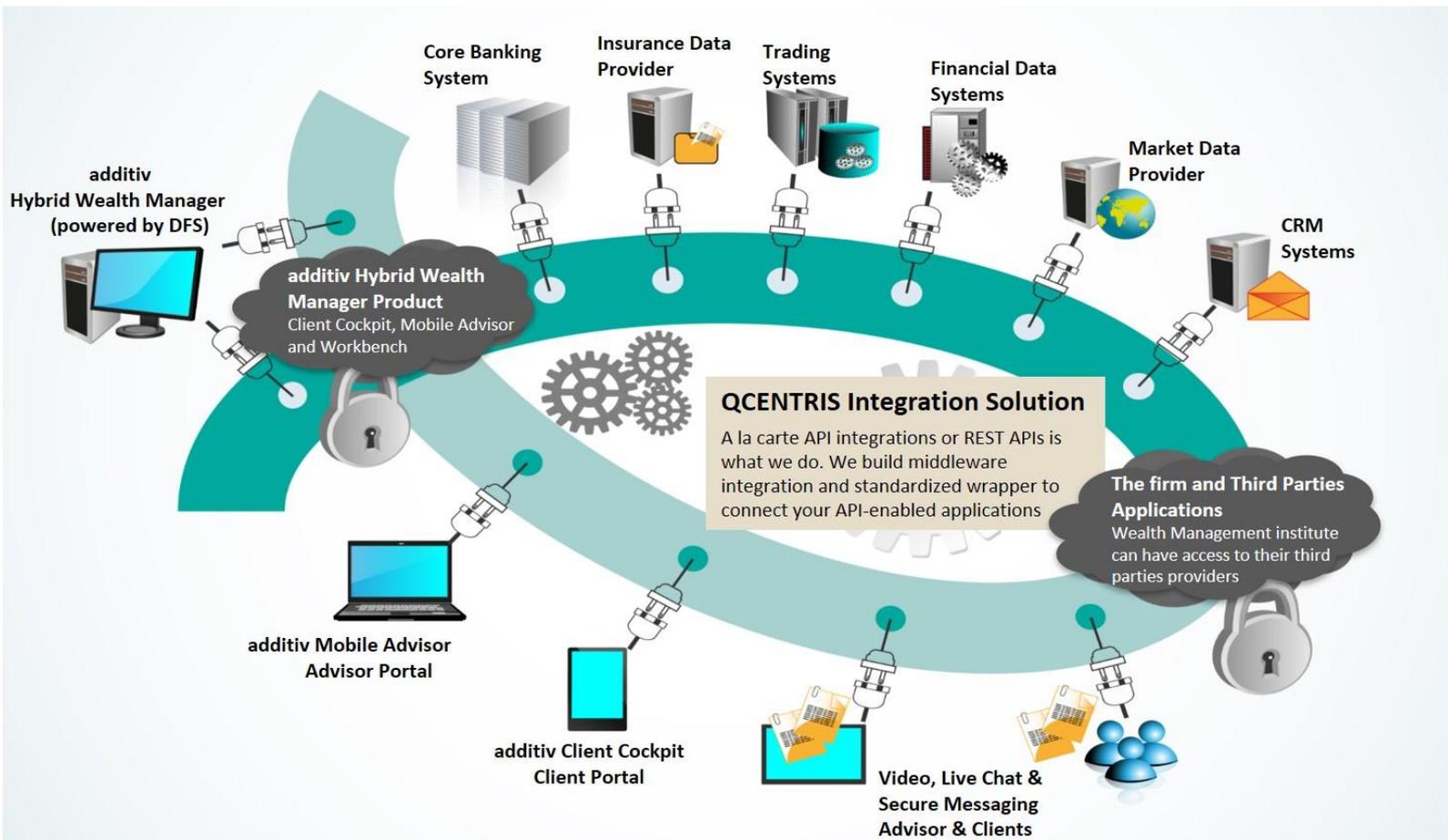
Our custom software integration and development process starts with gathering all your needs and out-of-the-box requests, where we define your fit-for-purpose request, define new business functions and technical features, create a timeline, and agree on a project plan.

Our assigned experienced QCENTRIS project manager will work together with your team to manage the custom development. DevOps and hybrid agile are one of the methodologies that we apply and we make sure that these methodologies fit your operational model.

## additiv Hybrid Wealth and QCENTRIS Service Capabilities



## QCENTRIS Integration Solution Capabilities





## Case studies

### Overcoming digital wealth management challenges

With our Implementation model, we supported one particular international client to install **Hybrid Wealth Manager**. As a bank, with a large retail banking and wealth services portfolio, we enabled client to exceed their strategic goals.

Following implementation, the bank, who have operations in Switzerland, Germany, and elsewhere across the globe, were able to:

- offer their customers full digital wealth management services
- implement a standardized and optimized solution
- achieve better time to market

At QCENTRIS, our delivery team is familiar with hybrid cloud services. Delivering infrastructure components design and implementation seamlessly is always ensured, regardless of our clients individual challenges. And despite this particular bank's exceptionally stringent reliability and performance requirements, including disaster recovery/fail-over mechanisms, we were able to deliver on time and to budget.

As with all our installations with additiv, our on-site training formed part of the implementation process, with training tailored to each client's individual processes.

### Digital wealth management implementation solutions

Whether it is a client portal, synchronization, data import or integration, we have the expertise and the implementation know-how to meet our clients highly specific requirements and here are some examples:

- Build customized client and advisor portals and build own screens with user-defined information
- Integrate with any custodian to import account information and transactions.
- Integrate with trade systems to generate orders and process trades
- Import pricing, security, and corporate action data from external market data provider
- Integrate the platform to any self-clearing broker dealer
- Customize the goal-based portfolio module and the digital advisory model to provide further capabilities for clients either such self-service or via their advisors to match with the best fit investment products.

# QCENTRIS

To learn more:

Visit us at [www.qcentris.com/wealth](http://www.qcentris.com/wealth)

or contact our Chief Digital-Technology Officer: [e.ninier@qcentris.com](mailto:e.ninier@qcentris.com)



## About QCENTRIS

Founded more than 10 years ago, QCENTRIS Group has evolved over time, expanding from a Quality and Testing company, into a Software Development and Digital Technology business focused on Wealth and LendTech.

A full-service custom software development company, QCENTRIS handles project development throughout the entire lifecycle: starting with strategic planning and UX/UI design, through application development and quality assurance, to technical delivery, production maintenance, and support – all delivered with quality and fast agility to effectively support businesses in new generation financial and insurance industries.

QCENTRIS is a reliable quality assurance, software development and outsourcing technology partner, and provides complex and cost-effective IT solutions for companies of all sizes – from small businesses to international groups. The group has a global consulting and engineering network with more than 400 people and supports clients in all of Europe, Middle East and South Asia.