

# ACCLAIM

RECOGNISING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY  
THROUGH THE *WealthBriefing* AWARDS PROGRAMME

The Second Annual  
*WealthBriefing*  
Wealth For Good  
Awards Winners  
2023



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# Embracing Sustainable Investment Practices With Finfox



**Andreas Borg**  
CEO  
Finfox



*Winner*

- **Best ESG Reporting Solution (Switzerland & Liechtenstein)**
- **Best Technology Enabled ESG Service (Switzerland & Liechtenstein)**
- **Best Implementation of an ESG Solution (Switzerland & Liechtenstein)**

## **Please tell us how Finfox advances causes such as ESG and sustainability and what sets it apart?**

Finfox is a software for hybrid investment advice, developed in Switzerland. Our solutions are a digital transformation enabler for banks, advisors and their clients and advance ESG and sustainability in an impactful way. We offer a comprehensive integration of ESG principles into products, services and underlying advisory processes, empowering banks to implement their ESG philosophy throughout their offerings.

Finfox efficiently adheres to regulatory requirements, thus providing bank advisors with the flexibility to focus on personalized investment advice. As a result, investment clients benefit from tailored solutions that precisely meet their preferences, values, and requirements. What sets Finfox apart is the effortless and seamless integration and promotion of ESG in the advisory process and investment decisions.

## **What steps are you taking to stay ahead of competition?**

The cornerstones of our philosophy include a close collaboration with our client banks through co-creation processes, fostering a strong relationship and ensuring that our solutions align with their specific needs. User testing plays a crucial role in Finfox's approach, allowing for a client-centric focus by gathering feedback and refining products and services accordingly.

Additionally, Finfox maintains a vigilant watch on market developments and is frequently sought after as a trusted advisor to conduct gap analyses, refine concepts, and provide expert insights.

## **Describe how Finfox has managed to encourage users to support and drive forward its initiatives in the ESG space?**

Firstly, our platform effortlessly adheres to regulatory requirements, whether in Switzerland and Liechtenstein or at the EU level, enabling advisors to focus on

what really counts – personalized investment proposals with an impact.

By incorporating ESG as a differentiating factor, Finfox allows sustainability to permeate all aspects of the advisory process, empowering banks to integrate it seamlessly as part of their value proposition and offering.

The flexibility of Finfox enables users to consider different dimensions of sustainability in their investments, going beyond avoiding negative impacts to achieving true positive impact through sustainable investment strategies and solutions, continuous monitoring, and transparency across all channels.

Finfox considers customer understanding and their respective preferences – especially in the context of ESG – as a key pillar to deliver personalized investment solutions. Through these aspects, Finfox encourages users to actively participate and embrace sustainable investment practices that have a positive environmental and social impact.

## **What challenges around ESG topics are you most focused on?**

Finfox is primarily focused on addressing challenges related to the seamless integration of ESG into the advisory process and providing transparency on all ESG related aspects of investors' investment decisions. One key challenge for our client banks is the availability and quality of ESG data (e.g. EU Taxonomy data).

Finfox tackles this challenge by accommodating different data sources, leading reporting solutions, and sustainability dimensions within the tool. By addressing these challenges, Finfox aims to empower both advisors and their clients to navigate the complexities of ESG investing effectively.



# Finfox. The award-winning software solution for hybrid investment advice.

The wealth management of the future is both personal and digital. In other words: hybrid. Automated and standardized for the bank, yet perceived as individualized by the client. Supporting client engagement at all touchpoints, effectively conveying the value-add to the client.

Welcome to Finfox. Investment advice redefined.



Find out more