



 **FinfoAdvice**

Meet modern client demands with smart self-services

FinfoAdvice is **the dedicated digital channel for your clients**. With it, you can reach your clients anytime and anywhere. Send them **personalized proposals** and ask for their **feedback**. Provide them with new investment themes directly from your research team. Prompt them to **update their risk profiling** and other preferences. Empower them to create and edit fund savings plans through

guided self-service. With FinfoAdvice, your clients can act in a **completely digital and independent way**, with the advisor being never more than a click away. As a **white-label solution**, FinfoAdvice integrates seamlessly into existing mobile and web banking environments and can be deployed **independently of the bank's existing advisory solution** – whether Finfo or any other advisory tool.

 **Benefits with FinfoAdvice**



Truly hybrid advice

Seamless collaboration between clients and advisors.



Efficiency unleashed

Streamlined advisory with guided self-services in a seamless digital channel



Enhanced engagement and experience

High-quality advisory experience across all channels strengthen client relations and satisfaction



Use Cases



End-to-end digital self-services for fund savings and pension plans



Straightforward regulatory self-profiling



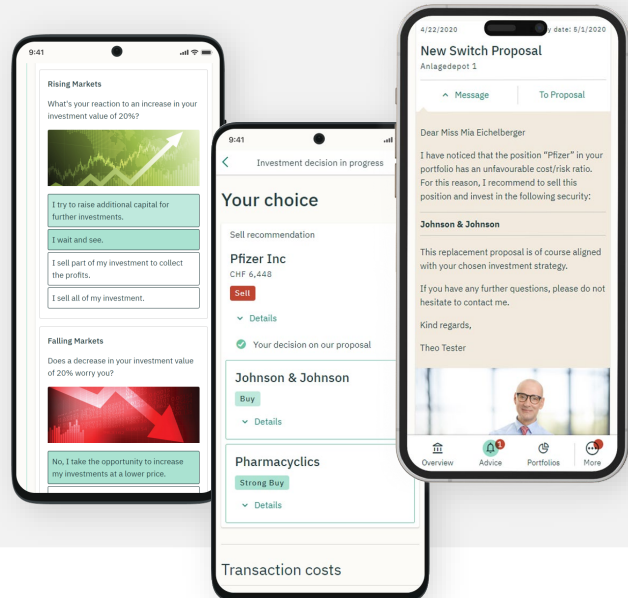
Interactive determination of an investment strategy



Personalized investment and alternative proposals



Tailored investment topics on the basis of data analytics



USPs



End-to-end digital investment and retirement journeys: A white-label solution for digital fund savings plans, retirement investing and much more directly within the bank's mobile and web banking.

Scalable growth through digital self-services: Digital investment journeys reduce the cost-to-serve while enabling banks to serve digital-first client segments efficiently.

Digital, yet personal: The adviser is never further away than a click.

Empowering advisors by reducing operational workload: Advisors often spend up to 70% of their time on non-value-adding tasks. FinfoxAdvice shifts routine processes into digital self-services so advisors can focus on high-value client interactions.

Campaign management: Tailored and target group-specific investment proposals can be generated for multiple portfolios at the push of a button and directly offered to clients' smartphones.



What our clients say



"FinfoxAdvice enables us to successfully implement our positioning as a hybrid bank in the investment business. Thanks to the integrated application, our clients receive investment tips on their smartphones anytime and anywhere, which significantly enhances the customer experience."

Tea Schmid
Head of Advisory Processes & Systems



"Thanks to Finfox, our clients receive a transparent and comprehensive overview of their portfolio's contribution to various sustainability aspects. This is well-received. At the same time, the regulatory requirements are met – uncomplicated and efficient."

Renato Herrmann
Senior Product Manager, Value Stream Investing & Provision

100%
of our FinfoxAdvice clients state they have more frequent customer interactions

Get in touch to learn more about the Finfox product suite

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Website