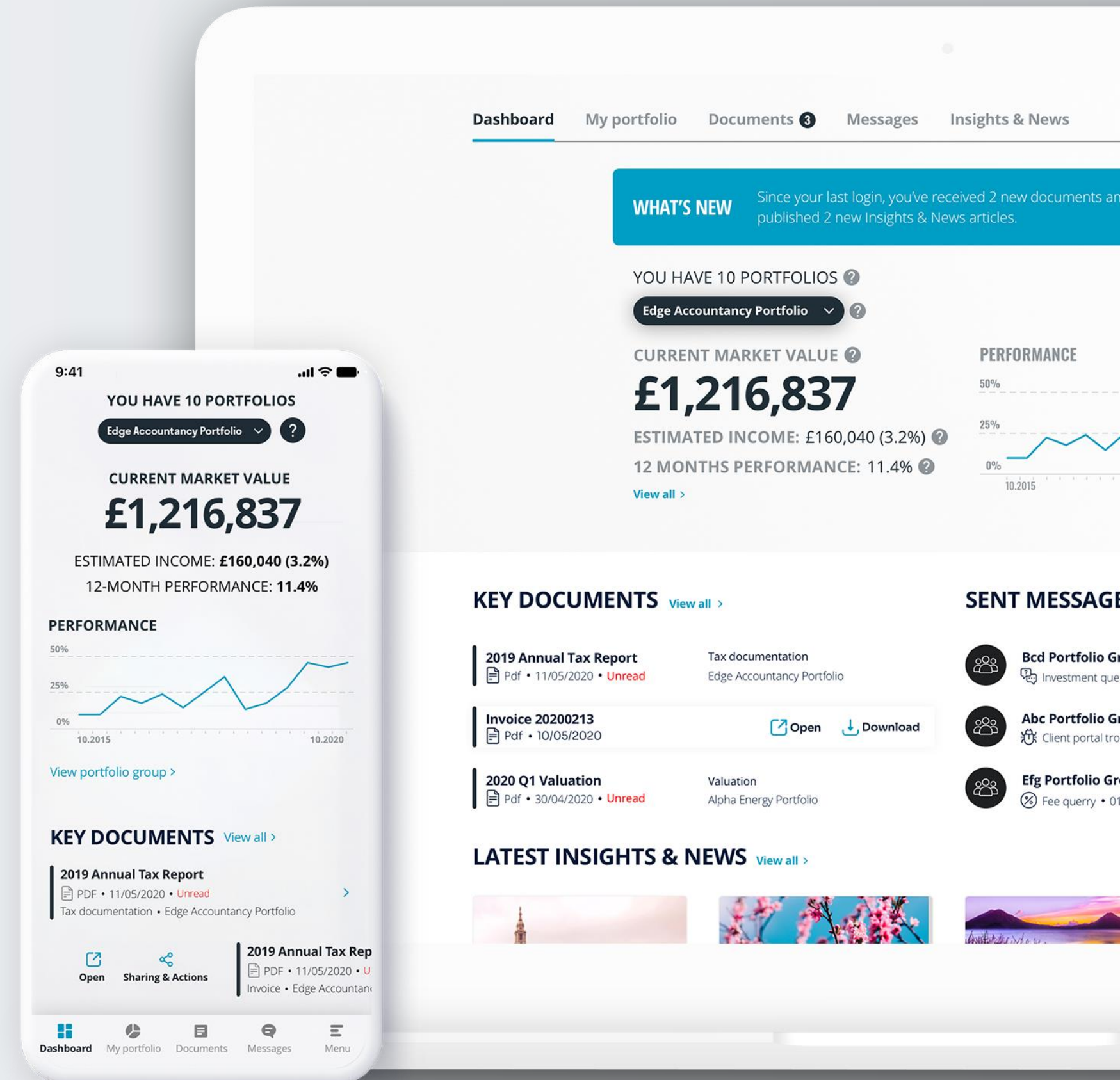


# DORSUM'S WEALTH PORTAL READY TO USE FOR ADDEPAR CUSTOMERS



# DORSUM'S WEALTH PORTAL BRINGS STATE-OF-THE ART CLIENT SERVICES FOR ADDEPAR CUSTOMERS

- **One-stop shop** for all digital services a modern HNW investor could demand.
- **Digital engagement tools (secure & instant 2-way messaging)** to perfectly complement in-person services.
- **Enhanced client communication and engagement** for all client types (private clients, charities, IFAs and their underlying clients).
- **Clients to feel like they are part of an online community** (e.g. tailored educational / media content etc.).
- **Reduced cost-to-serve for clients** (more information immediately available to clients).
- **Modular architecture** with a selection of components to choose from.
- Several value-adding **third-party integrations**.



# ABOUT DORSUM

Dorsum is Europe's leading investment software & solutions provider and most trusted partner for the digital transformation of investment services.

**10**  
countries with  
projects



**80+**  
clients with  
10k daily users



**300+**  
employees in 5  
international offices



**15+**  
international  
awards



**3X** FINOVATE  
BEST OF SHOW

WealthBriefing **SWISS**  
AWARDS 2023

**FF** BANKING  
TECH AWARDS





# DORSUM'S OUT-OF-THE-BOX WEALTH PORTAL CONTAINS A VARIETY OF MODULES THAT ARE READY TO USE FOR ADDEPAR CUSTOMERS



Digital advisory



Suitability & appropriateness



Portfolio composition & look-through



Performance analytics



Transaction history



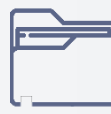
ESG reporting



Communication & Engagement



Insights & news



Document management



IFA & admin tools



Usage statistics & data analytics



# WE SEAMLESSLY INTEGRATE THIRD-PARTY SOLUTIONS TO CREATE A BEST-OF-BREED PORTAL

- Supercharge Wealth Portal with value-adding integrations.
- Dorsum's Wealth Portal is ready to use plug-and-play 3rd party solutions from market-leading providers.
- Recent Wealth Suite integration partners include:

## ONBOARDING – KYC



## ECOSYSTEM PARTNERS



## DATA



## ANALYTICS

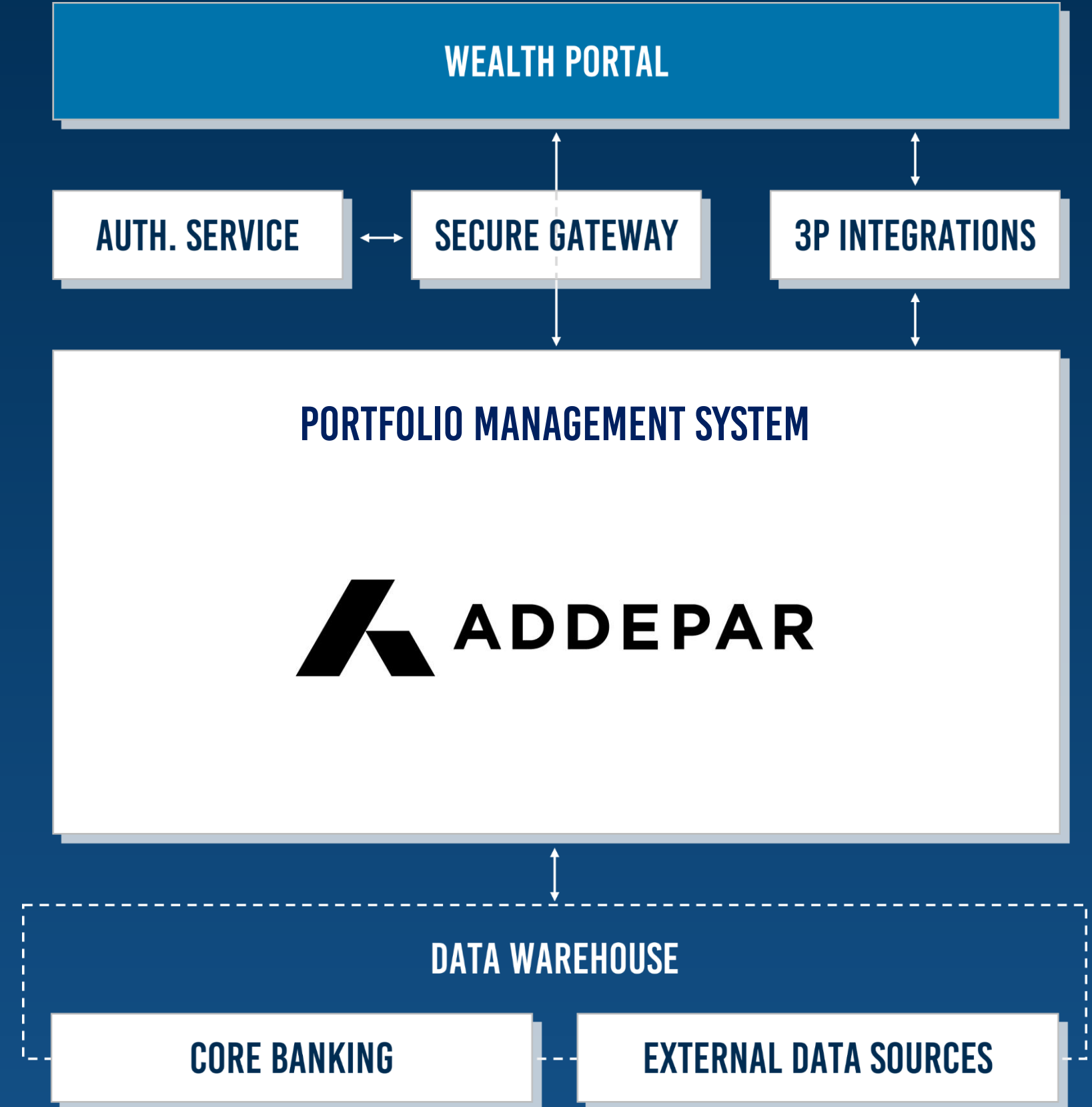
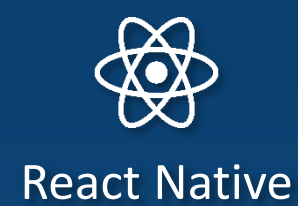
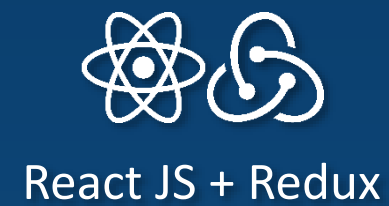


\* Cooperation set up targeted for 2024.



# ARCHITECTURE BEHIND THE WEALTH PORTAL

- Easy to turn on Wealth Portal integrated with Addepar's data
- The Portal designed fully to your Brand can be set up for you and launched to clients in a few weeks free of charge.
- The Portal connects to your current Addepar System and displays the data using an easy-to-read UI.





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