

Our Client

The Client is an independent private bank, based in Germany with a long history of service High Net Worth Individuals (HNWI). To enter the digital market with a separate brand the bank offers digitalized products to wealthy clients the bank founded a subsidiary company.

The Challenge

The clients customer are wealthy individuals (usually at the age of 40+ years) with a variety of assets (accounts, real estates, other financial products etc.). The customer should have a single point of truth on all their assets providing them transparency, useful analysis as well as other value added services with simple interactions. The customer should easily be empowered to get insights on the following assets:

- Connection of cash accounts and securities deposits in real time
- Entering real estates with a value indication for the value of the real estate
- 24/7 monitoring of investment portfolios
- Integrate lifestyle & luxury and library services.
- Fulfill high requirements for IT-Security and data privacy.

Our solution

Integrated into an App the customer can aggregate all his personal bank accounts and deposits in one mobile application. Further the customer can add real estates and get them evaluated by algorithms. Within the App the customer receives further valuable analytics covering his portfolios over all accounts from different banks. The app is a hybrid solution and offers personal converting capabilities (UpSelling) based on events within the accounts. The following Fincite Core modules have been used:

- Fincite.Connect
- Fincite.Interact
- Fincite.Analyse

