Openfinance

BEST PORTFOLIO

Our simplest and most practical solution, adapted entirely to the needs of financial advice companies

- Easily configures the specific features of each client's business model.
- Automates the processes of providing investment advice and preparing proposals and reports, which allows them to monitor all the positions of their clients in aggregate, regardless of the depositories.
- Ensures current and future regulatory compliance to help them achieve business targets and client satisfaction.
- Has an environment with exceptional user experience that also offers direct access to the end client.

Advantages for business

CLOUD TOOL
No software installation, no complicated setup or backup processes, with multi-channel access possible.

CONTINUOUS UPDATING
It considers not only the required adjustments to the regulations in force, but also the evolving needs of the industry.

CONFIDENTIALITY
Our infrastructure ensures data privacy by preventing possible leaks or manipulation. It meets high standards for privacy and information security.

INTEGRITY
The platform maintains an updated backup copy, which ensures immediate response in the event of an incident.

MULTI-USER
It provides all members of the team with individual access – each having their respective user role.

MULTI-DEVICE
Both clients and entities can readily access the solution from any device with internet access.

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Functions of the solution

1 **Analysis of client positions and report preparation,** allowing for automatic integration of all client positions and transactions from different custodians.

2 **It automates the entire business advice process,** from running the suitability, convenience and risk control tests to preparing investment proposals.

3 It supports **client business tracking** with the help of CRM, alert administration, controls and statistical monitoring, which benefits continuous advisor/client communication.

4 It allows you to perform any activity relating to **contract management,** from rebalancing them and sending orders to the required calculation of fees.

5 It provides a **client portal,** which can be used to manage their investment profile, generate interactive reports on their portfolios or review details of their proposals.

6 Access to the **Openfinance Ecosystem,** a marketplace that incorporates the market's best wealthtech solutions – fully integrated with Bestportfolio.

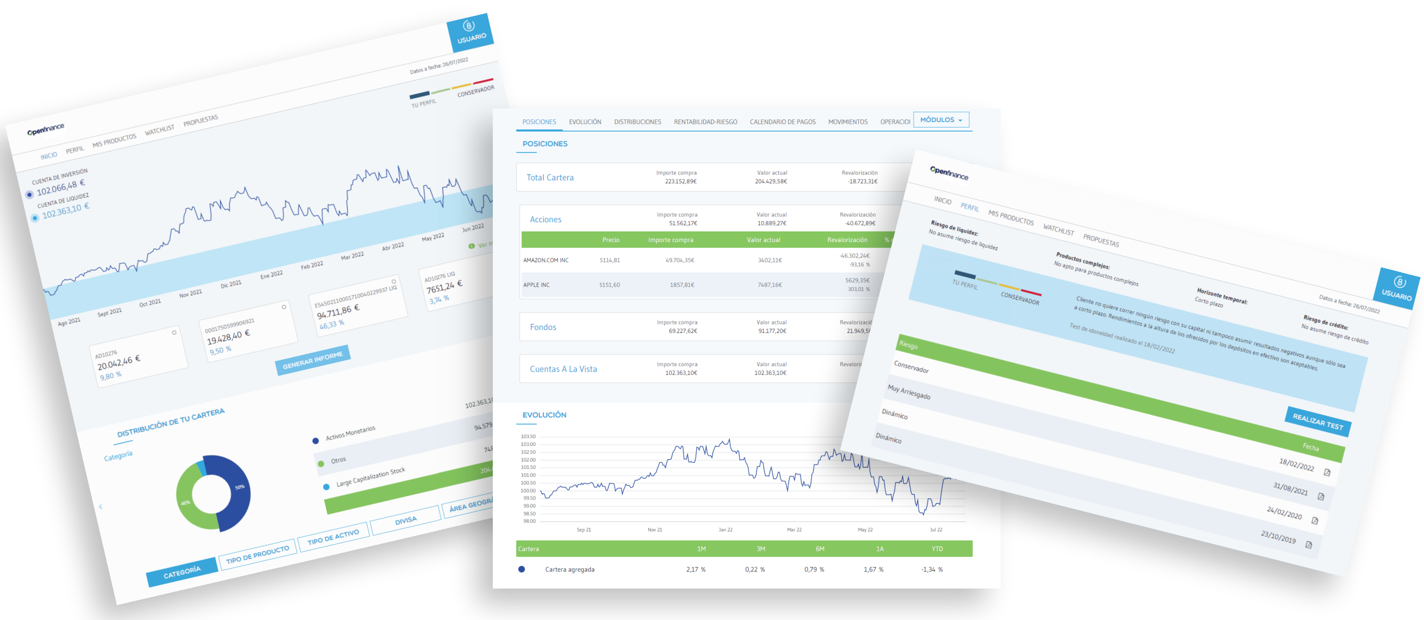
+45 family offices

+20 years of experience

+7,000 clients

MiFID II compliance

Our solution



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