multi support®

THE ART OF
INNOVATION

swisspartners
The art of finance.

Process automation helps international wealth management take on the future

An industry leader on the move

The swisspartners Group is an independent Swiss financial services provider dedicated since 1993 to the needs of its international private clients. Today, it is one of the largest financial services providers in Switzerland and growing internationally. The waiver of bank secrecy, tightened regulatory provisions, increased investment market demands, and growing competition have challenged the traditional Independent Asset Manager. Furthermore, both private and institutional clients increasingly favour financial service providers offering a comprehensive spectrum of services.

> We learned the lesson. Adding more hands — even outsourced — won't do it. It takes process automation technology to make our business truly scalable.
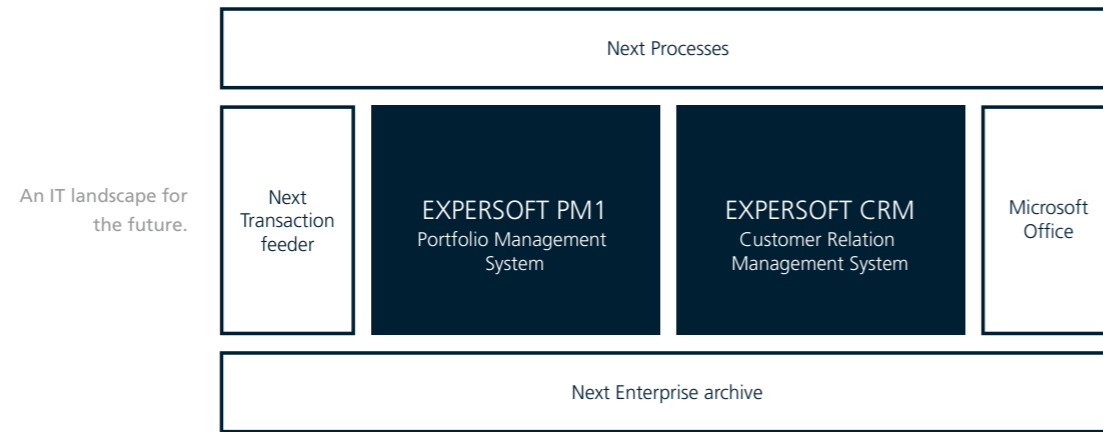

— **Kristian Bader,**
COO & Partner at swisspartners

Do you want to hear more? Contact us at: mail@multi-support.com

For years swisspartners has successfully expanded into business activities complementary to traditional Wealth Management, such as swiss and international trust business, as well as unit-linked insurance solutions. Today, the swisspartners Group represents more than 5.5 billion Euro assets, 1,600 client relationships, 100 employees and locations in Zurich, Geneva, Feldkirch, Vaduz and a representative office in Madrid.

IT landscape for the future

The core systems at swisspartners are the portfolio management system (PMS), and the customer relation management system (CRM), both from Industry experts EXPERSOFT. These systems allow swisspartners to efficiently serve more than 1,600 demanding clients from all over the world.

An IT landscape for the future.

| Next Processes			
Next Transaction feeder	EXPERSOFT PM1 Portfolio Management System	EXPERSOFT CRM Customer Relation Management System	Microsoft Office
Next Enterprise archive			

Transactions fuel everything

For the PMS system to deliver it's accurate and valuable services, it needs huge amounts of transaction data. Error-free and up-to-date data on every single transaction related to a client's portfolio. This sums up to thousands and thousands of transactions each month, from multiple banks all over the world. And in a myriad of different formats and languages.

Such transaction data does not come for free. Especially when both quality and speed are paramount. At swisspartners they have previous experience in gathering the data using raw manpower. Both internally, and outsourced. But neither way provide a long-term sustainable solution. Automation is a must.

Automation is a must

Electronic transaction feeds are definitely a part of the solution. Unless you are willing to limit your clients to only a few banking options, it will however not be a viable solution for all transactions anytime soon.

This is where Next Transaction feeder — a vital component in Next Bank statements — fits in.

Next transforms statements into high quality data.
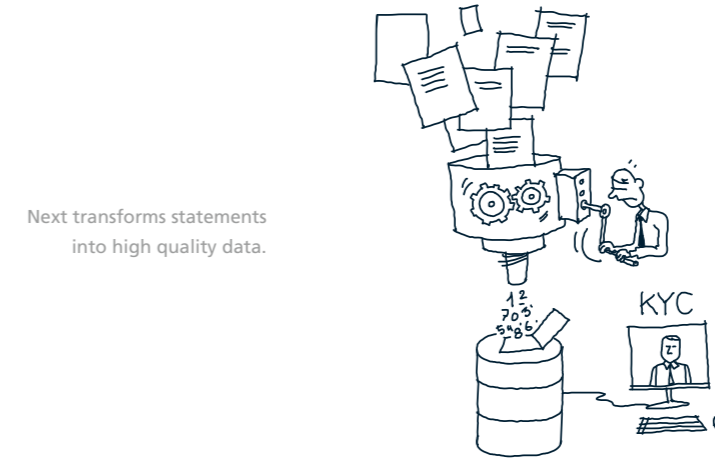
Next will read statements from more than 700 banks, in any language, from PDF, XML or paper, and turn it into high quality transaction data.

Ready for validation, before it can be transferred to the PMS system.

Enterprise archive

All transaction documents are stored automatically and securely in the Next Enterprise archive. Easily available from within the EXPERSOFT CRM solution, and using an encrypted connection available to staff from any swisspartners location in the world.

> With Next from Multi Support, we got both a platform for process automation, and a valuable partner for the future.


— **Othmar Büeler,**
Head IT at swisspartners

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Man / machine collaboration

Validation of high-value financial transactions requires deep expertise and is managed by the swisspartners Data & Processes team. To help them perform faster and better, Next Processes is equipped with a set of complex business rules tied to each individual transaction type. An easy-to-use interface, intelligent processes, and the ability to see the original transaction document, help secure both quality and efficiency. And once the transaction is transferred to the PMS, everything is available in the Enterprise archive — including a bulletproof audit log, that documents everything to the millisecond.

The Next solution at swisspartners is designed for ease of use.
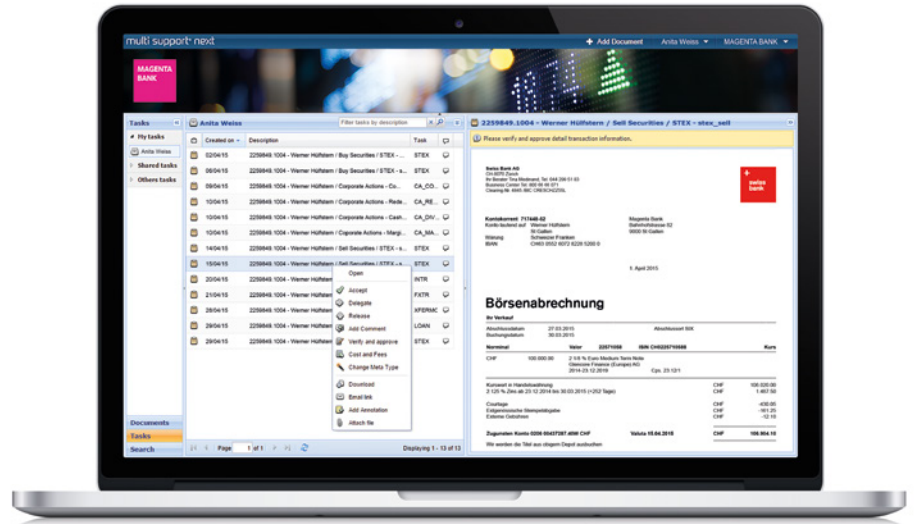
GDPR and the likes

Wealth management is — like banking — a highly regulated industry. And just like any other business dealing with EU citizens, swisspartners must comply with the GDPR (EU's personal data protection regulation). Without an enterprise archive, and well documented processes, such compliance requirements constitute an overwhelming and ever-growing challenge. Next doesn't eliminate this challenge, but surely makes it more manageable according to Kristian Bader, COO & Partner at swisspartners.

Facts

Founded	**Employees**	**Locations**
1993	100	5
Industry	**Business system**	**Assets**
Financial services	EXPERSOFT PM1	€ 5.5 billions