

Bring emotions into your investment advisory & sales process

For a long time, the focus of investment advisory was on regulatory issues. The influence of themes and events on customer portfolios and customer preferences were hardly considered. But investors want to be actively advised and understand the impact of events such as the US elections or themes like climate change on their portfolios. Thanks to storytelling, the "Investment Story Platform" allows your bank's own research view to flow into your investment advice in a comprehensible way. An investment story is based on research, fascinates, and arouses emotions. A new and personalised advisory experience for your clients is guaranteed!

6 convincing key features

The Investment Story Platform is the only platform to actively offer event- and theme-based investing and to monitor the entire sales process based on campaigns. On all channels, complementary to your existing wealth advisory solutions.

1 Story matching

Efficient analysis of the customer book using filters and graphics to find suitable and relevant topics, events, and research views.

2 Campaign management

Industrialised creation and management of sales campaigns.

3 Channel management

Used in all channels: e.g. to prepare investment advice, as support in customer meetings, as a catalogue in e- and mobile banking.

4 Event & theme management

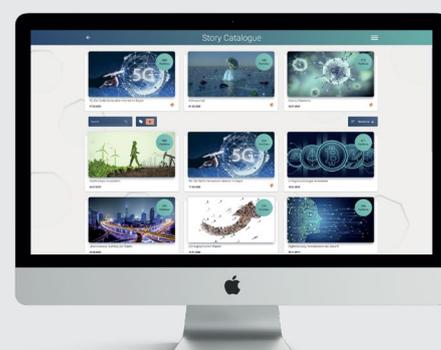
Create a new story or import existing investment content. Define target group and investment products.

5 Portfolio construction

Innovative and personalised portfolio construction for individual customers or for customer groups.

6 Success monitoring

Which client advisor was the most active?
Which client portfolios have benefited? Which events and themes were most successful?
Everything becomes measurable.



Seamless integration into your system landscape.
Easy to use for customer advisors.

Benefits for banks and customers

- Strengthening trust between client, advisor, and bank
- Turning customer meetings into an experience
- Offering emotional investment proposals
- Implement the Bank's own investment strategy centrally and consistently
- Simple exchange of suboptimal assets in customer portfolios
- Individual transactions instead of mass restructuring



When may I demonstrate the platform to you?

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