3rd-eyes redefines financial planning and investment advice

About 3rd-eyes

Make your clients invest like institutional investors

3rd-eyes is a financial technology company that offers highly customisable digital advisory solutions to banks, investment advisors, insurance and software companies.

- 3rd-eyes navigation system provides investment advice as a result of a holistic assessment of your client's wealth and based on a financial planning that includes your client's financial goals.
- 3rd-eyes recommends funds and ETFs for your client to invest in based on your client's personal values & beliefs and executes either via a bank partner or via your execution platform of choice.
- 3rd-eyes applies an Asset Liability Model (ALM) methodology otherwise only available to institutional multi-billion euro portfolios.

Our offering

Financial planning as On-Premises software or «Software as a Service»

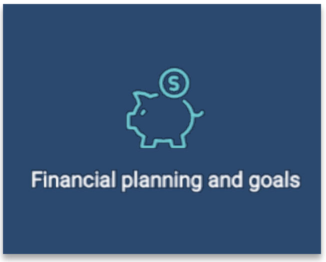
We offer a customisable, highly flexible digital solution improving the service to your clients.

With 3rd-eyes you…

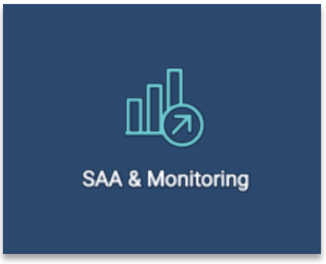
- Understand your client's financial situation, financial goals and personal values & beliefs.
- Simulate how your client's financial goals impact wealth over time.
- See how different asset allocations impact financial outcomes and how values & beliefs impact the Fund and ETF selections.
- Provide individualised asset allocations plus investment recommendations of funds and ETFs.
- Execute the investment recommendation at your custodian bank.
- Adjust client's asset allocation dynamically and offer on-going portfolio monitoring.
- Comply with upcoming regulatory requirements – risk profiling and advisory protocol.

3rd-eyes modules

Select from a range of independent modules or white label the entire system



Assess your clients' financial situation and understand the client's current asset structure (assets in 15 asset classes, including real estate) and liabilities.
Incorporate the client's financial goals and select from 40 different financial goals grouped in 7 different families – from early retirement to capital preservation.



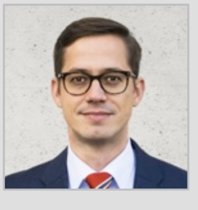
The methodology is built on a proprietary allocation model that assesses up to 25'000 different allocations in 5'000 capital market scenarios to determine the optimal strategic asset allocation (SAA) for each of your clients.
Apply dynamic monitoring to your client's financial situation and provide new recommendations with changes in financial goals, asset structures or capital markets.

Incorporate your client's personal values (e.g., Environmental, Social and Governance (ESG) aspects and transparency) as well as your client's beliefs, i.e. investment criteria such as rule-based vs. discretionary, ETFs vs. active funds, focus on small mid cap, regions/markets etc. into the decision making process and allow for full portfolio customisation

Incorporate a digital on-boarding process for a full digital solution. Fully comply with your compliance requirements with the automatic generation of advisory protocols in line with upcoming regulatory frameworks.

Execute on your clients' individual investment recommendations with a simple click by connecting our advisory process with your custody services or custodian partner.

Your contact person



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