



Goal-based, individual and sustainable wealth planning by 3rd-eyes analytics



Digital wealth planning and investment advice as SaaS

## About us

A comprehensive wealth planning and investment advisory solution. We evaluate how the financial goals of your customers can be fulfilled and recommend a bespoke asset allocation to maximise their goal achievement probability. We incorporate your customers' values and beliefs in the advisory process to fully customise their portfolios.

To ensure the best possible outcome for your customers, we use a sophisticated Asset & Liability Management methodology, which ensures superior simulation and optimisation results. Our methodology has so far only been available to institutional investors.

## Why 3rd-eyes analytics?

1. Team with significant experience in asset & wealth management, IT and sustainable investments
2. Comprehensive set of functionalities for a complete wealth planning and investment advice solution
3. State-of-the-art IT architecture of our solution ensuring easy integration tailored to client needs

Our Solution is  
delivered as SaaS or  
via API

## We have a modular approach

Are you interested in licensing a specific module or the full solution? Select from our range of independent modules and integrate them seamlessly into your existing advisory process. Our solution can be implemented as Software as a Service or via an API.

### Our Modules



#### Profile

Incorporate your customers' personal information and ensure regulatory compliance during the onboarding process, incl. fee transparency



#### Assets & Goals

Assess your customers' individual wealth situation including mortgages and non-bankable assets like real estate. Incorporate your customers financial goals and simulate how the total wealth develops over time in different scenarios.



#### Recommendation

Optimise the asset allocation of your customers and provide individual recommendations on how to best improve their financial situation and goal achievement based on realistic scenarios.



#### Portfolio

Deliver investment recommendations across different asset classes based on customer-specific investment criteria, values and sustainability.



#### Execution

Transfer the recommended portfolio to your portfolio management system for rebalancing and generate the required regulatory documentation.

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