

BANKER'S FRONT

CLIENT LIFECYCLE MANAGEMENT DIGITAL PLATFORM

Optimize your client services and regulatory compliance to
increase your revenue margin



OBJECTWAY

BANKER'S FRONT CLIENT LIFECYCLE MANAGEMENT DIGITAL PLATFORM

We leverage our extensive experience in wealth management, reinventing ourselves to innovate and adapt to an industry in evolution and facing structural challenges:



Increased constraints on regulatory compliance



Constant margin erosion



Client expectations for greater availability, transparency and modern digital communication channel



Mosaic of disjointed legacy applications complexifying efficient customer relationship

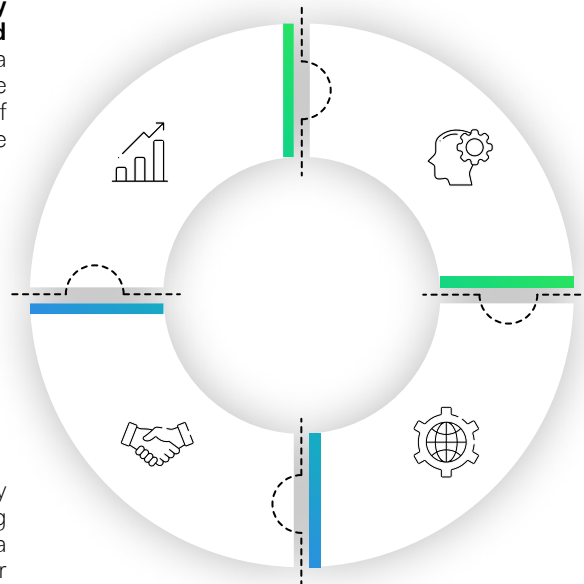
Our **award winning solutions** are made for private bankers and wealth managers to enable them to **turn these challenges into opportunities**.



Digitize and grow your business with our Banker's Front solution

Banker's Front is an innovative advanced digital **Client Lifecycle Management (CLM)** platform. It efficiently empowers banks, wealth managers and investment managers to manage a successful digital transformation journey:

Improve the users experience and productivity and focus on **value-added business activities** with a single client-centered intuitive solution covering all steps of the client relationship cycle



Offer your clients **an enhanced customer experience** via digital innovative solution, without reducing the value of the trusted and personalized relationship between the client and his banker

Increase revenue by capturing and retaining business opportunities with a better management of your client relationship

Combine powerfull **specialized wealth management** digital solutions at your own pace and with **your own specificities**

OUR SOLUTION

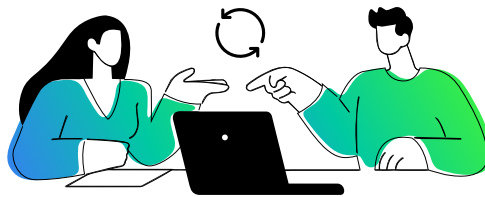
Banker's Front solution integrates two main functionalities: a CLM & Advisory Cockpit and a Client Portal.

These two features are both independent and complementary, and you can either choose to implement one of them, or both.

BANKER'S FRONT

CLM & Advisory Cockpit

The banker has a complete centralized cockpit to monitor and manage his prospects and clients



Client Portal

The final HNW client benefits from a superior experience and seamless digital interaction with his banker

“

A single platform combining a 360° view of clients and assets with advanced CLM capabilities



THE BANKER'S FRONT SOLUTION

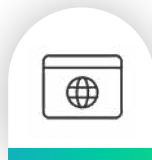
CLM & ADVISORY COCKPIT

The solution covers all business and regulatory compliance needs on a single, modern and user intuitive digital front-end solution.

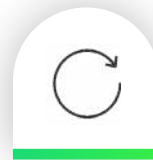
The relationship manager has a 360° vision on his clients from a CRM perspective including document management, asset & holdings, investment proposals and can even place orders. It's a unique and consistent interface for the wealth manager that integrates all the processes involving client interaction.



Intuitive digital front-end

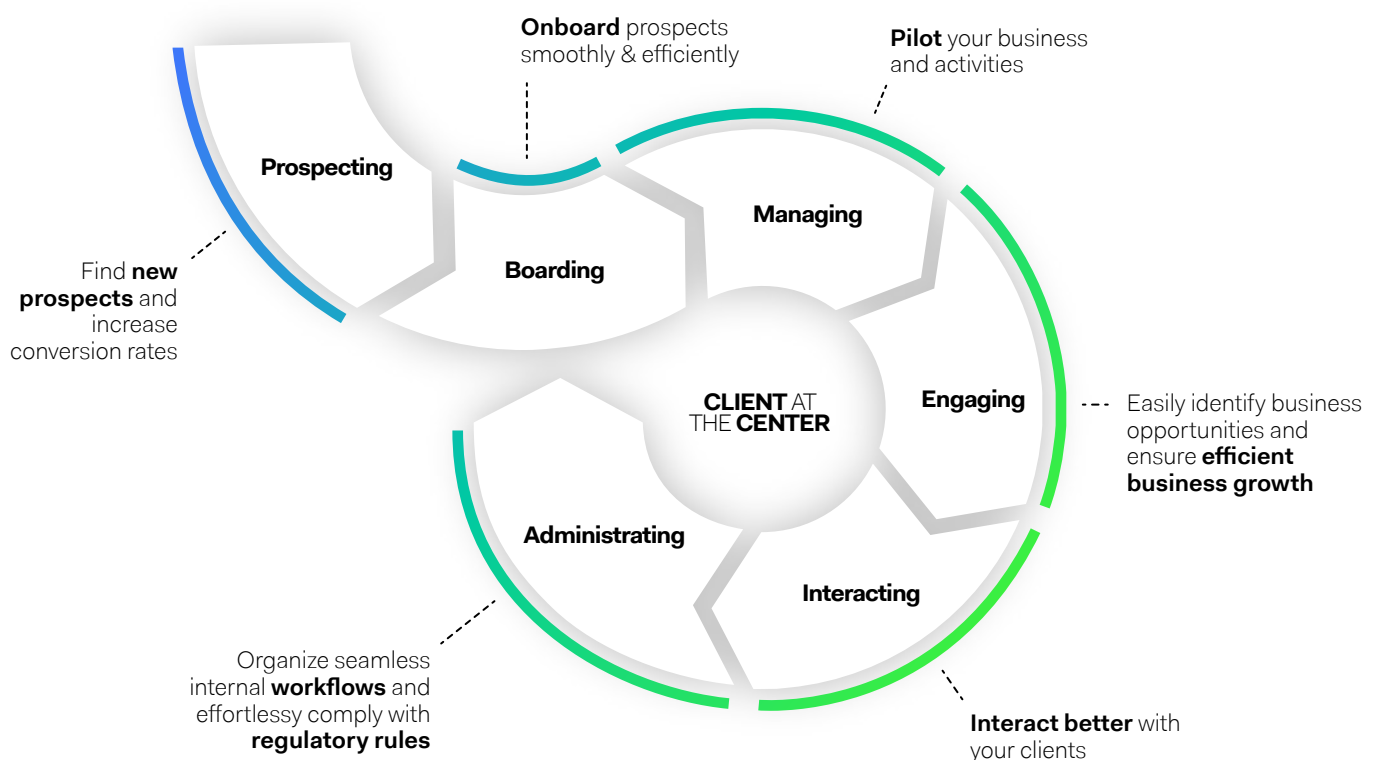


Unique interface



Entire CLM

The solution covers the entire client lifecycle, from prospect management and relationship management through ongoing Client Lifecycle Management.



An integrated experience where key processes between different roles in the organization and between the

relationship manager and his clients are digitalized and efficient.

“

*A digital platform
fully adaptable to
your branding and
visual identity*



THE WEB AND MOBILE CLIENT PORTAL

The client portal offers a powerful user experience with full digital availability for the final HNW client or external asset manager:

- Consult information (complete e-Banking with asset allocation, performance, positions, movements)
- Receive and share documents and investment proposals
- Generate high-end reports, on-demand

- Place orders with the appropriate pre-trade controls and restrictions
- Easily interact with the relationship or investment manager through secured messaging chat.

Banker's Front client portal provides a similar and shared digital experience between the banker and his clients: assets, performance, reports, and client data come from the same source and are presented in a similar way. Available through desktop or mobile applications.



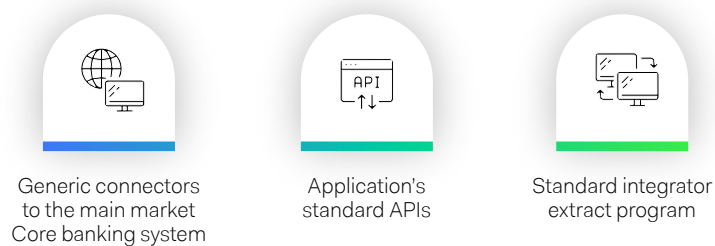
“

A comprehensive digital solution that can be deployed with modular functionalities at your own pace

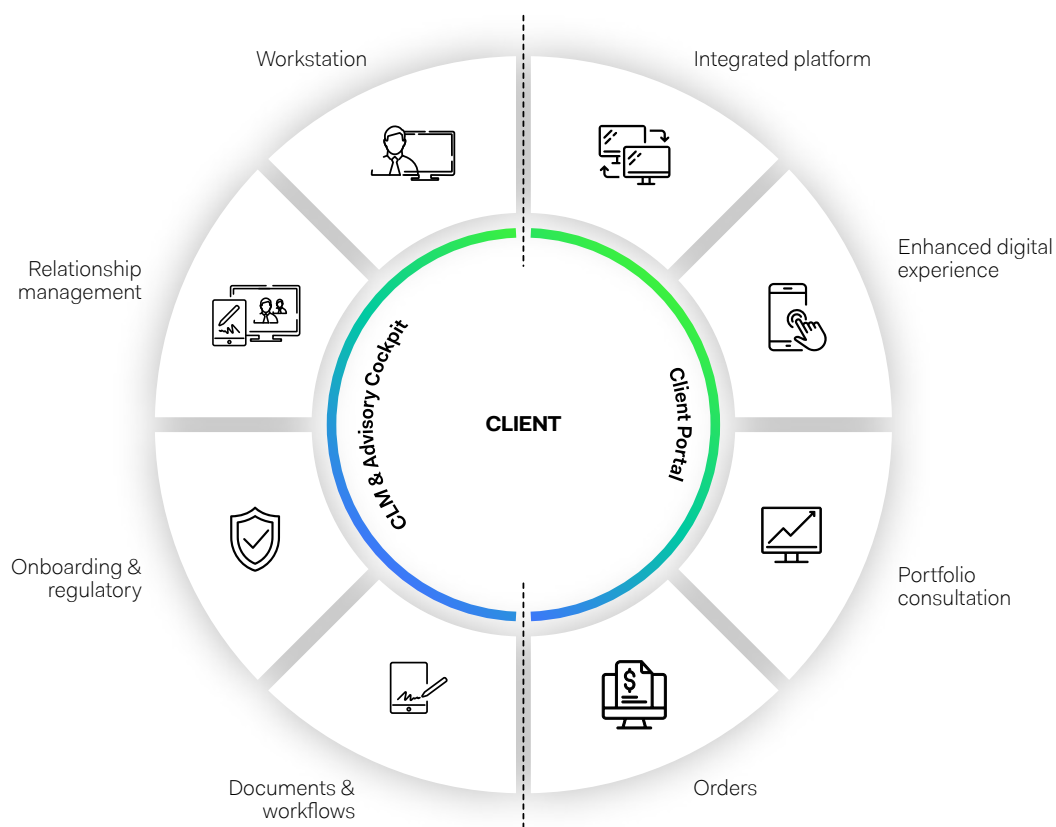
INTEGRATION

The Banker's Front solution uses a segregated database that has been designed to be **integrated with any core banking system** in real-time with feeds from depository banks in

a multi-custodian approach. It can integrate data coming from various sources regardless of content and format.



The solution remains open to the integration of specialized third-party FinTech and RegTech while ensuring the highest levels of security on the market.



BANKER'S FRONT KEY FEATURES

CLM & ADVISORY COCKPIT



WORKSTATION

- Widget and role-based dashboard
- 360° client or asset centric view
- Performance and asset allocation
- Portfolio consolidation
- Orders (cash and securities)
- Investment proposals



ONBOARDING & REGULATORY

- Full workflow from prospect to client onboarding, customized according to the bank's policy
- KYC & AML risk
- Investor's profile (incl. MiFID II, LSFIN, suitability and appropriateness requirements)
- Support of multi-jurisdiction and various client structures (individual, corporate, trust, etc.)
- Client information review
- Restrictions and alerts



RELATIONSHIP MANAGEMENT

- Prospect management
- Client management (financial planning and wealth information, clients' connections)
- Contact management (events, contact reports, tasks)
- Opportunities management (pipeline, client's evolution and concerns)



DOCUMENTS & WORKFLOWS

- Secured document management
- E-signature
- Banking processes and workflows
- Collaborative virtual rooms

CLIENT PORTAL



INTEGRATED PLATFORM

- Fully synchronized with the CLM and Advisory Cockpit with same data source
- Document sharing between the banker and the client
- Live secured chat with the possibility to share documents and investment proposals



ENHANCED DIGITAL EXPERIENCE

- Design responsive
- Available through web or mobile apps (iOS and Android)
- Ergonomic and easy to use
- Multi-language with a fully customizable design to match your visual identity and branding



PORTFOLIO CONSULTATION

- Dynamic portfolio consultation
- Performance
- Asset allocation, positions and movements
- Market information (rates, prices...)
- Report generation and data export
- External asset manager features including portfolio consolidation



ORDERS

- Cash payments
- Security orders
- Real-time compliance checks and pre-trade restrictions
- Global orders for external asset managers





WHY OBJECTWAY

For over 30 years, Objectway has been a trusted partner to banking, asset and wealth management firms, delivering scalable solutions that drive performance and **empower** the **entire value chain**.

As a full-service provider, Objectway seamlessly integrates across business operations and service models, guiding clients through their transformation journey with highly **configurable solutions**.

For each business, we create a solution design that maps the business value chain, as a technology enabler or as an outsourcer, designing a specific solution for each case. Our innovation framework is aligned with the client's situation, ambitions and ultimate objectives when it comes to rationalizing existing complexity, streamlining operational processes and workflows, or transforming the operating model.

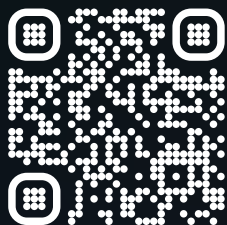
Every situation is part of an **evolutionary process**, in which we scale together, because the client's growth is our success and our shared journey towards excellence.

As a global **TOP-100 FinTech provider** (IDC FinTech Rankings), Objectway administers over €1 trillion of assets and supports more than 100,000 investment professionals (financial advisors, private bankers, relationship managers) to manage over €700 billion AUM for more than 5 million investors.

Our growth strategy, driven by both organic expansion and strategic acquisitions, has propelled us to €130 million in revenue (FY 2025). We serve 250+ leading banks, wealth managers, asset managers, and insurers across EMEA and Canada.

With a **global presence** and a team of 800+ business and technology professionals, Objectway operates from offices in Italy, the UK, Belgium, Germany, Switzerland, France, Ireland, UAE, and Canada. Our flexible solution design adapts to both global and regional structures, enabling scalable growth across customers, geographies, and the entire value chain.





OBJECTWAY

Phone: +39 02 89 800 1

Mail: marketing@objectway.com

Site: objectway.com