

E-BANKING

WEB & MOBILE CLIENT/EAM PORTAL

Optimize your client services through an integrated web & mobile e-Banking Platform



OBJECTWAY

E-BANKING

WEB & MOBILE CLIENT/EAM PORTAL

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



Emerging of a new demographic customers profile



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



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.**



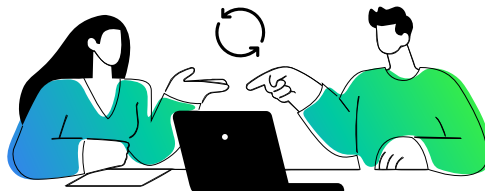
Digitize your business with our web & mobile Client/EAM portal

E-Banking solution is part of the Banker's Front solution, which integrates two main functionalities: a CLM & Advisory Cockpit and a Client/EAM Portal (e-Banking). 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

FOCUS ON BANKER'S FRONT: AN IDEAL COMBINATION

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.
- **Increase revenue** by capturing and retaining business opportunities with a better management of your client

relationships.

- Combine powerful **specialized wealth management** digital solutions at **your own pace and with your own specificities**.
- Offer your clients **an enhanced customer experience** via digital innovative solutions, without reducing the value of the trusted

and personalized relationship between the client and his banker.

If you are interested in knowing more about our Banker's Front solution, please request the brochure or download it from our website.

THE E-BANKING SOLUTION

E-Banking solution offers a powerful user experience with full digital availability for the final HNW client or external asset manager:

- Consult information such as asset allocation, performance, positions and 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.

The client/EAM 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.

KEY BENEFITS

- **Customizable:** the e-banking platform is fully customizable to the bank's needs with the bank's visual identity & multi language
- **Omni-channel communication:** the solution allows a multi-channel communication between the bank and its clients, including secured live messaging, documents workflow and e-signature
- **Responsive:** e-Banking solution is accessible through all devices (desktop, tablet & mobile)
- **Shared data:** a single set of data available at any query level for both clients and advisors, and in real time
- **Secured platform:** fully protected application with a secured system and access via biometrics (fingerprints/face ID) or token.

INTEGRATION

The solution uses a dedicated layer 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.



Connectivity to any
core banking system



Our solutions
standard APIs



Open to third-party
vendors

“

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

“

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



E-BANKING **KEY FEATURES**



INTEGRATED PLATFORM

- Document sharing between the banker and the client
- Live secured chat with the possibility to share documents and investment proposals
- Secured access
- E-signature (optional)
- Complementary within Banker's Front and fully synchronized with the CLM and Advisory Cockpit with same data source



PORTFOLIO CONSULTATION

- Dynamic portfolio consultation
- Performance
- Asset allocation, positions and movements
- Market information (rates, prices...)
- Live report generation and data export
- EAM (External Asset Manager) features including portfolio consolidation



ORDERS MANAGEMENT

- Cash payments
- Security orders
- Real-time compliance checks and pre-trade restrictions
- Global orders for External Asset Managers



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





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.

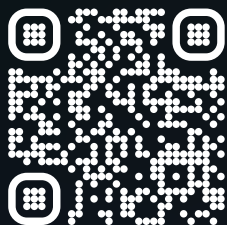
Every situation is part of an **evolutionary process**, in which we scale together, because the client's growth is our success and our shared journey towards excellence.

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.





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