

LOGICAL ACCESS

ELECTRONIC DOCUMENT MANAGEMENT SYSTEM

Cover the complete document lifecycle in a secured environment



OBJECTWAY

LOGICAL ACCESS

ELECTRONIC DOCUMENT MANAGEMENT SYSTEM

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



Heavy and paper based workflows increasing manual tasks and operational risk



Increased constraints on regulatory compliance (GDPR/DPA...)



Constant margin erosion and increased competition deteriorating levels of commissions and fees



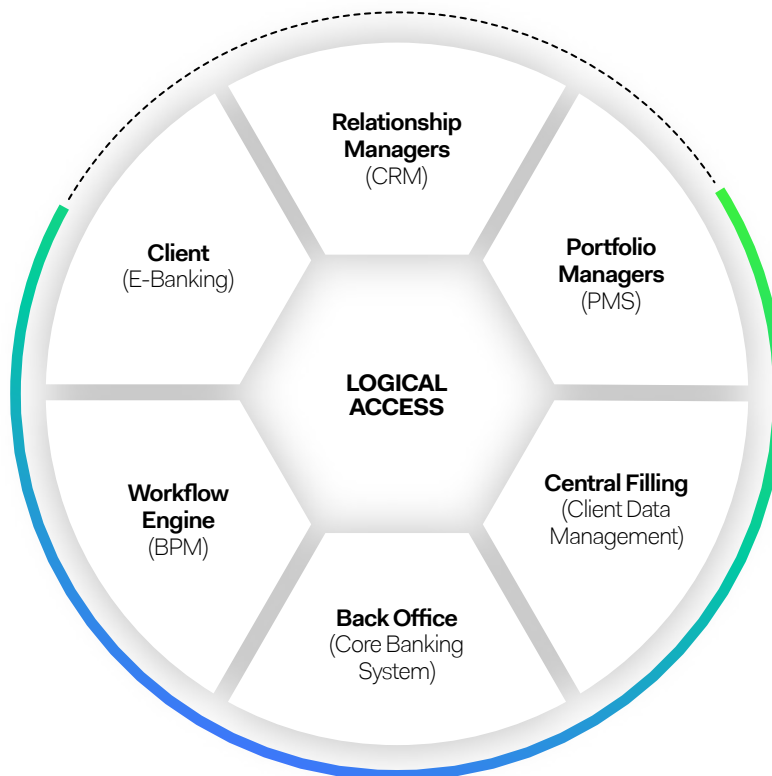
Client expectations for digitization including document availability and processing

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



Cover the whole document lifecycle through a centralized and secured management system

Electronic Document Management System allows private bankers and wealth managers to streamline their processes as document handling is key in any workflow. Compatible with any third-party vendor, Logical Access is also **fully integrated with our solutions** and provides the full value chain with its document management features whether it is broadcasting, generating or storing.



OUR SOLUTION

Logical Access is a secured document management and archiving solution specifically designed to meet private banking and wealth management industries needs.

It is a cost effective way to enhance customer satisfaction through **rationalization of document handling**. Indeed, the strengthening of banking regulations and the immediate availability of documents are increasing trends that justify the choice of an electronic archiving solution, enabling banks to efficiently manage these conformities and governance projects.

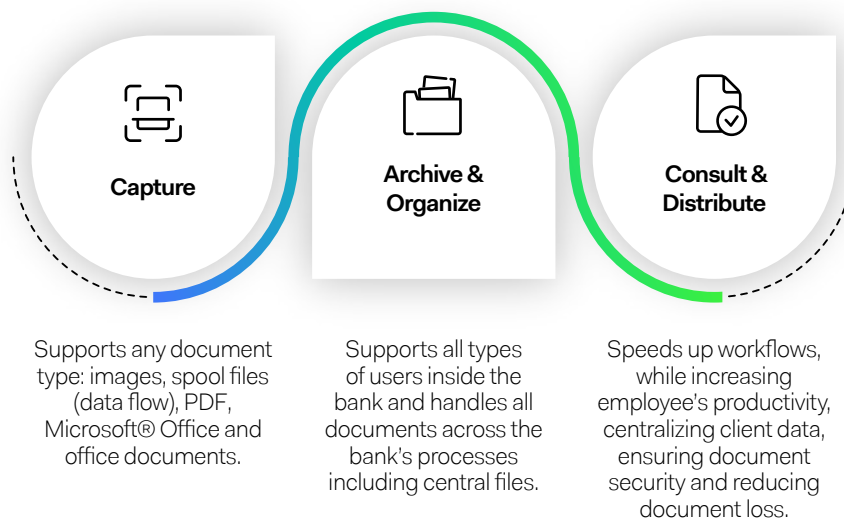
Logical Access allows you to **capture, organize, archive and deliver** a large volume of documents and content by covering the complete document lifecycle in a reinforced security environment.

The solution enables relationship managers to manage all the files used in daily banking processes through an **Electronic Document Management System**, positioning itself as a key element to the banks' approach towards client-centric and KYC strategies.

Specifically designed for the private banking and wealth management industry, the solution is also designed to meet all aspects of regulatory constraints and documents are accessible immediately by authorized users through strong **access rights management**.

DOCUMENT LIFECYCLE

Logical Access solution allows private banks and wealth managers to have full control over each step of the document lifecycle:



INTEGRATION

Logical Access is an n-tier solution integrating easily with your existing **in-house or standard Core Back-Office system**. Its scalability allows the management of large amount of documents with an unlimited number

of users. The solution is available within a **desktop or web based environment** allowing connectivity and integration to any third party applications through an API.

KEY BENEFITS

- **Optimization** of the solution which reduces the operational cost through rationalization of document management and internal processes automation increasing employees' productivity.
- **Flexibility** in adapting to changing business needs through modularity and scalability of the application, and configuration to meet various requirements in terms of organizational structure or security.
- **Security** guaranteed by a complete control over the document lifecycle, aligned with data security standards. Documents are protected against loss and accidental damage including external corruption (hacking).

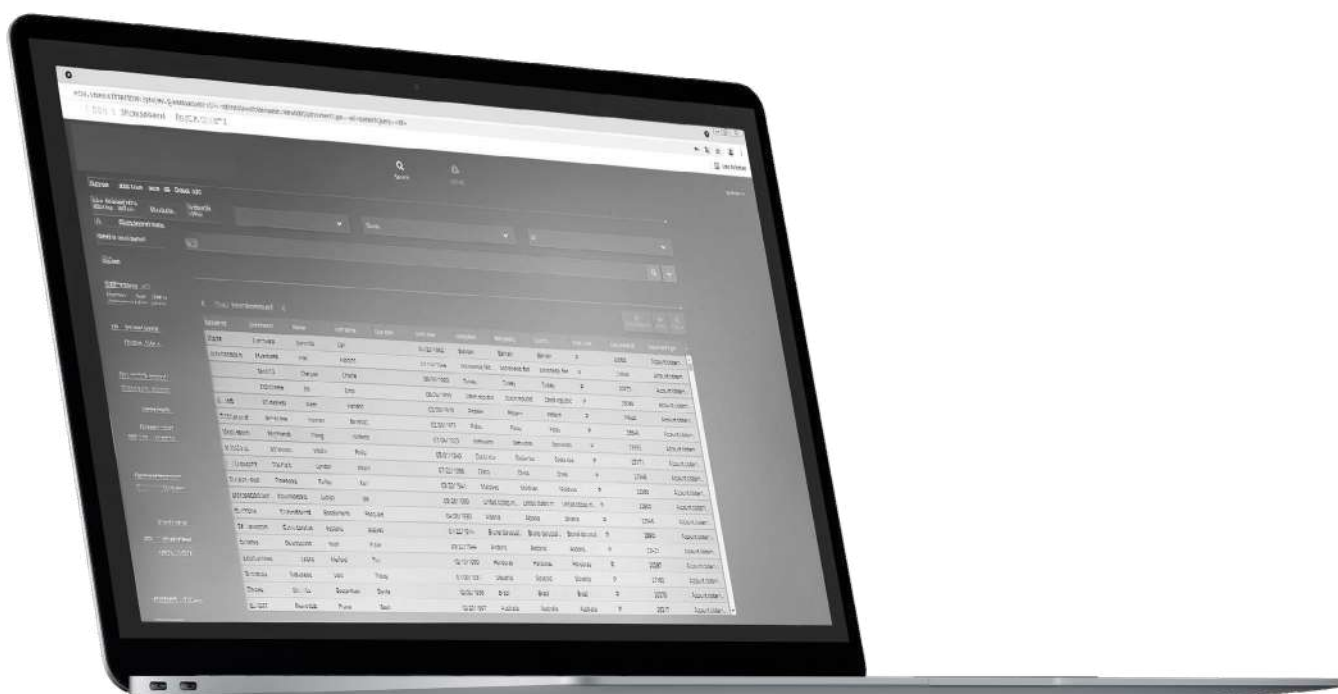
- **Enhanced** customer services through connectivity to third party applications.

Logical Access modular approach offers a highly configurable and multi-language graphical user interface, which can be adapted to the bank's needs.

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*Logical Access is
an n-tier solution integrating
easily with your existing
in-house or standard core
back-office system.*





LOGICAL ACCESS

KEY FEATURES



DOCUMENT CAPTURE

- Automatic and manual archiving
- Scanning / mass scanning / history (OCR, barcode)
- Back-Office connection
- MS Office and Adobe Acrobat plug-in
- Document generation



ARCHIVING /ORGANIZATION

- Any type and nature of document
- Relational Meta Data management
- Configurable filing plan
- Document access rights controls
- User/Profile access rights definition
- Advanced security controls
- Activity tracking



DISTRIBUTION

- Quick, simple and advanced search based on documents Meta Data
- Full text search
- Virtual document
- Dedicated banking mailing printing (Hold Mail, Client Mailing, Mass Printing)
- Compatible with automatic mail packing systems
- API capability



SECURITY & USER RIGHTS

- Documents accessible to authorized users
- Strong user / profile access rights definition
- Audited & traceable users actions (from login to logout)
- User rights and authentication
- Document and data encryption
- Digital signature (including timestamp)
- Document blurring /masking
- Smart card control
- Secured document consultation
- GDPR Compliance



WEB PORTAL

- Available in a web browser
- Document meta data based advanced search
- Direct document archiving from the web page

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.

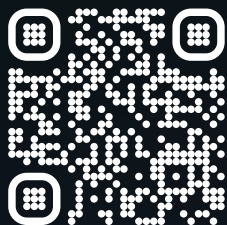
Every situation is part of an **evolutionary process**, in which we scale together, because the client's growth is our success and our shared journey towards excellence.

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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