



Indigita

Efficiency
DESIGNED AND DEVELOPED BY THE KEY

EXAMPLES OF USE CASES

INDIGITA & THE KEY INTEGRATE AUTOMATIC CROSS-BORDER CONTROLS

Peace of mind regarding product suitability and cross-border regulations, built right into "Efficiency", the Portfolio Management / Client Relationship Management System for EAMs and Family Offices.

The integrated solution for financial intermediaries allows to handle their portfolio management, client relationship management and back office operations in a compliant and cost-effective manner. Based on the unrivalled regulatory knowledge of BRP Bizzozero & Partners and BRP Tax, the tool helps external asset managers and family offices operate safely in today's highly complex regulatory environment.

Thanks to its modular approach, the solution is highly flexible and can easily be tailored to specific client needs. It can be accessed on desktop computers, laptops and via dedicated app on mobile devices.

INDIGITA SA

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PRACTICAL USE CASES	SERVICES	PRODUCT PLACEMENT	TAX SUITABILITY
Onboarding	■		
KYC Review	■		
Meeting management	■	■	■
Travelling management	■		
Marketing doc. related to financial product and send automatically to client	■	■	■
Product suitability 360 degrees	■	■	■
Advisory service and investment proposal	■	■	■
Order processing	■	■	■
Tax rating at the product value file level			■
Offboarding	■		

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