



additiv digital investment management solution goes live at PostFinance

- **PostFinance goes live with a new digital investment management tool based on additiv's market-leading Hybrid Wealth solution**
- **The solution will support a spectrum of four investment solutions, from advisory and discretionary mandates to execution-only solutions, all on a full digital operating and servicing model**
- **The self-service capabilities will allow PostFinance customers to effectively manage their investments at any time, from anywhere through a single, intuitive tool**
- **For advisors, they can support clients remotely with single-stage processes including workflows and simulations, and instant proposal generation**

ZURICH, 5 May 2020 - PostFinance, one of the leading retail financial institutions in Switzerland, and additiv, a leading SaaS provider to the wealth management industry, today announce the successful implementation of a new, 100% digital investment platform for PostFinance customers.

The platform supports four PostFinance investment solutions, which range from advisory and discretionary mandates to execution-only solutions. Utilising additiv's market-leading Hybrid Wealth solution, the brand-new offering supports both self-service management as well as advisor-assisted interactions - all with a rich, immersive user experience.

The self-service element enables PostFinance clients to oversee and control their full investment portfolio, including ETFs and funds, through an intuitive tool. The feature rich functions include automated investing informed by PostFinance's investment committee views, automated daily portfolio monitoring, automated rebalancing, investment proposals triggered through portfolio monitoring, as well as model scenarios using extensive data.

Where advisor-assisted, the solution has features that allow for strong engagement while also giving the advisor the tools to operate as efficiently and effectively as possible, such as instant proposal generation and 'one-click' consent management.

Daniel Mewes, Head of Investment Solutions of PostFinance said "We are very pleased to offer our customers four digital investment solutions that support them in targeted, long-term asset accumulation. Thanks to innovative financial software from additiv, our customers benefit from simple, user-friendly access to the new services. Accounts can be opened simply in under 10 minutes, after which customers are free to manage their investments anywhere and anytime. This is an important step for PostFinance on its way to becoming a leader in digital investment management."

Michael Stemmler, CEO of additiv said "It has never been more important for wealth managers to offer a totally digital experience. This new digital offering from PostFinance provides the best digital servicing, allowing clients anytime, anywhere to access and control their invest-

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ments themselves or in close collaboration with advisors. But it also combines this with comprehensive engagement and fulfillment capabilities, such as data-rich, interactive views of the positions and performance, personalized idea generation as well as one-click consent management for proposals. We are confident this solution will see strong uptake from the PostFinance customers and deliver massive customer success."

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About PostFinance

With 2.7 million customers and customer assets of almost 120 billion francs, PostFinance is one of Switzerland's leading retail financial institutions. In its role as market leader and with more than a billion payment transactions a year, it ensures a seamless flow of liquidity on a daily basis. 1.8 million customers have access to e-finance. This makes PostFinance the ideal partner for everyone who wants to manage their own finances as easily as possible. PostFinance Ltd is a private limited company under private law and a subsidiary of Swiss Post Ltd.

About additiv

Established in 1998, additiv partners with the world's leading financial institutions to help them capitalize on digitization. Its market-leading DFS is an orchestration engine that lets financial institutions quickly launch new propositions as well as giving them the intelligence to maximize customer engagement. Headquartered in Zurich, additiv is supported by a broad ecosystem of implementation and solution partners that enable it to deliver unparalleled customer success to wealth managers and credit providers globally.

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