

Investment solutions for financial intermediaries

Offering	Banks	Independent asset managers and family offices	Services
Sustainable Investing as a Service	✓	✓	White Label Lösungen
	✓	✓	Model portfolios for sustainable and future-oriented strategies
	✓	✓	Innovative fact sheets on the model portfolios
	✓	✓	Shareholder engagement
	✓	✓	Marketing and training support
	✓	✓	New digital reporting solutions (e.g. Globalance World®)
Custodian bank services		✓	Account/safekeeping account management
		✓	Securities transactions
		✓	Innovative portfolio statements
		✓	Tax statements
		✓	Digital reporting solutions (e.g. Globalance World®)
Investment funds, tracker certificates	✓	✓	White label solutions
	✓	✓	Investment funds model portfolios
	✓	✓	Innovative fact sheets on the model portfolios

Sustainable investing is becoming increasingly important. Are you ready for the needs of your clients? Contact us, we will be happy to support you and look forward to talking to you.



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