

PRESS RELEASE

WeAdvise and software provider PSplus join forces to offer digital wealth management solution

White-Label robo-advisor platform WeAdvise and PSplus, a leading provider of portfolio management software, enter into a strategic partnership to offer an attractive digital solution for independent wealth managers and other financial services providers.

- Both partners join forces for an all-in-one solution for digital wealth managers
- Combined offerings includes digital onboarding, a client dashboard, multi-custodial reporting besides other portfolio management features
- Financial services providers profit from a 'best-of-breed' approach for a flexible and long-term digital wealth management solution

Munich / Germany, 28.01.2019 –WeAdvise and PSplus to offer a future-proof digital wealth management solution.

The service bundle includes all key components for a digital wealth offering including online account opening, portfolio management solution and regular client reportings.

Under the strategic partnership, WeAdvise will provide customisable white-label robo-advice technology. The technology will allow independent wealth managers to integrate their own investment strategies and offers, among other features, multi-custodial portfolios reports to be delivered to the client's digital dashboard.

PSplus will add its subject matter expertise around portfolio management and administration. Comprehensive interface for orders and transactions, adherence to all regulatory requirements and highly efficient processes will ease the administrative burden for financial services providers.

'We are looking forward to working together with PSplus, a leading provider of portfolio management software. Our combined offering covers all activities in the value chain of digital wealth management. Our clients will benefit from a best-of-breed approach enabling them to select the best provider for each service', states Christian Ropel, WeAdvise Co-Founder & Managing Director.

'WeAdvise is an ideal addition to our offering. Jointly we offer financial services providers a comprehensive, professional solution which will allow them to establish their digital face to the customer – both for acquiring new clients and managing existing relationships. Offerings of this kind will be critical for future success.' adds Dr. Peter Dobler, PSplus Managing Director.

About WeAdvise:

WeAdvise is an independent B2B provider of robo advisory technology. Our solution enables established financial services firms like banks, insurance companies and wealth managers to tap into new revenue sources and increase customer loyalty with state-of-the-art digital offerings. Our technology is highly adaptive, immediately ready-to-use and fully compliant with regulatory and data security requirements.

About PSplus:

PSplus is an independent provider of portfolio management software for wealth managers, family offices and foundations. PSplus solutions enable portfolio administration, performance analysis as well as consolidation / reporting of assets and generating orders. More than 20 years of experience and customers in Germany, Austria, Switzerland, Luxembourg, Great Britain and the US make PSplus a market leader in this segment.

Press contact:

WeAdvise AG

Lyonel-Feininger-Str. 28

80807 München

press@weadvise.de | www.weadvise.de

T: +49 89 954 609 58