

Operating Model & Governance



Governance & Organisation



Prozess-
standardisierung



Datenqualität &
Daten-Governance



Rollen &
Verantwortlichkeiten



Performance
Management



Clients & Relationship Managers

Relationship Management | Local Client Coverage | Individuelle Betreuung



Advisory & Wealth Capabilities

Wealth Planning | Investment Expertise | Advisory | Thought Leadership | Produktexpertise



Digital Client Experience

Client Portal | Digital Onboarding | Omnichannel Communication
Client Reporting | Dokumentenaustausch | Transparenz

Unified Wealth Operations Platform



Workflow
Engine



Durchgängige Prozesse
(Straight Through Processing)



AI Services
& Automation



Data Hub
& Integration



Echtzeit-Daten &
Single Source of Truth



STP Layer
& Orchestration



Controls
& Compliance



Integration
Layer



Skalierbare Services &
wiederverwendbare Komponenten

External Infrastructure & Services



Custodians &
Depotbanken



Core Banking
Systeme



Market Data &
Pricing



Payments &
Settlement



Regulatory
Reporting



Third Party
Services



Cloud &
IT Services

Risk, Security & Resilience



Cyber Security &
IAM



Operational
Resilience



DORA Readiness



Third Party Risk
Management



Business Continuity
Management



Incident Response