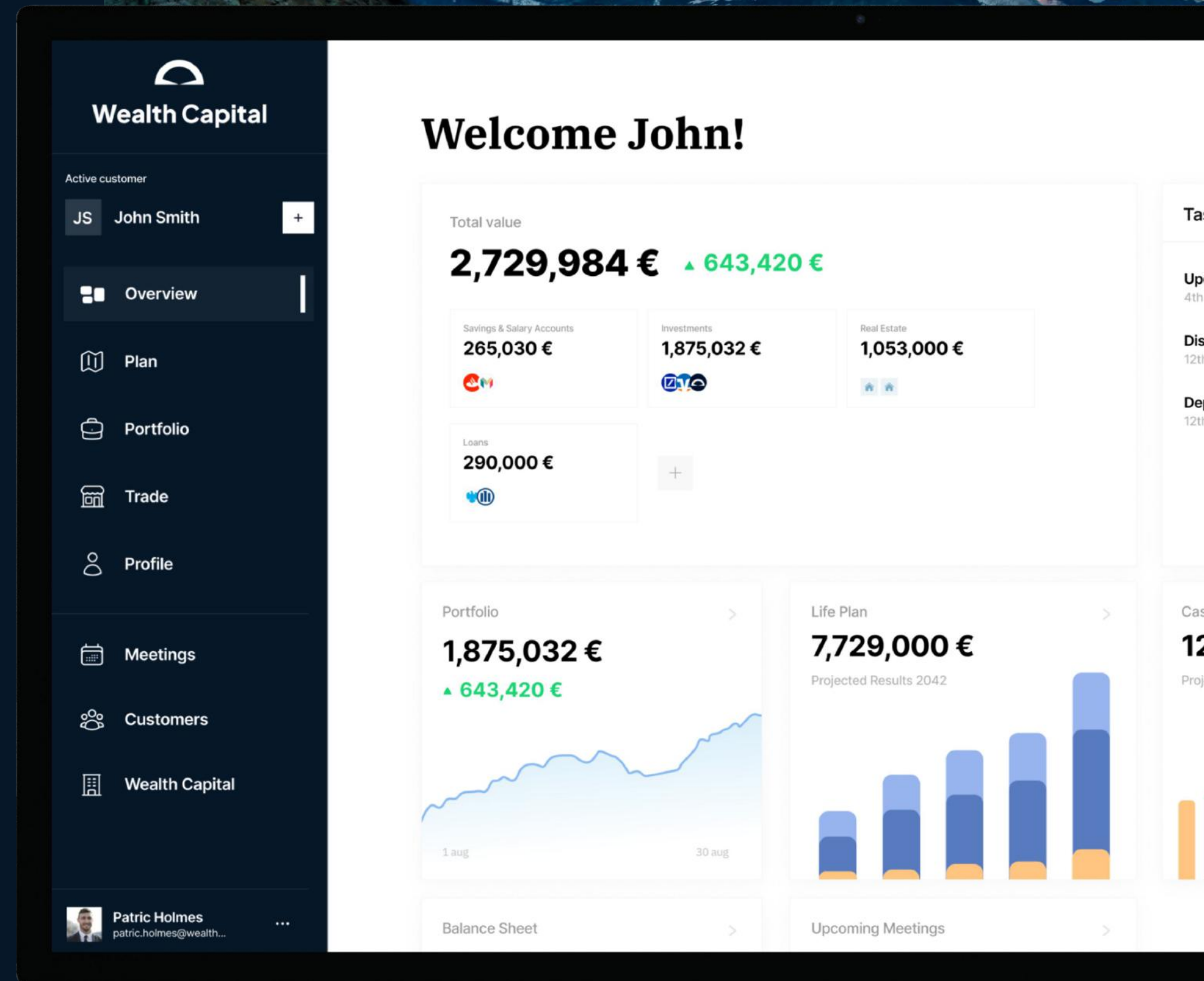


# Hybrid wealth management.

Cutting edge all in one  
platform for wealth managers  
and financial planners.



# About Alwy.

We're a team with a unique mix of finance and engineering renowned for building state of the art financial technology.

- Founded in 2020
- Headquartered in Stockholm
- Operating in 19 countries
- Serving 60k+ consumer clients
- Regulated entity, we understand your compliance needs



“

We have more time  
to focus on our  
clients after adopting  
Alwy's platform.

August Schmitz, CEO

evida 



# What we deliver to you.

---

## Alwy

- ✓ Enables growth and expansion
- ✓ One system for all your needs
- ✓ Onboard clients faster
- ✓ Grow revenue with integrated sale support tools
- ✓ Lower operational costs with automation
- ✓ Lower cost and complexity with one system
- ✓ Provide a professional, complete client experience
- ✓ Tailor to your processes and business
- ✓ Easily offer full suite wealth management services

## Other systems

- Constrain growth and expansion
- Provide fragmented data and no overview
- No data synced between systems
- Only offer one specific, fragmented solution
- Manual processes and operational complexity
- Multiple costs to cover your basic needs
- Old and unprofessional client experience
- Not tailored to your business and brand
- Difficult or impossible to offer full suite wealth management services



# The toolbox for your success.

---



Onboarding



Integrated  
trading



All compliance  
covered



Open Banking  
PSD2



Automatic  
rebalancing



Upload, manage  
& sign documents



Model  
Portfolios



Integrated  
transfers



Advisory & Discretionary  
management



AML, PEP,  
KYC, Sanctions



Tax & reporting



Mobile app



Financial  
Planning



CRM



Internationalised  
15+ languages



Fees &  
Payouts



White Labeled  
for your brand



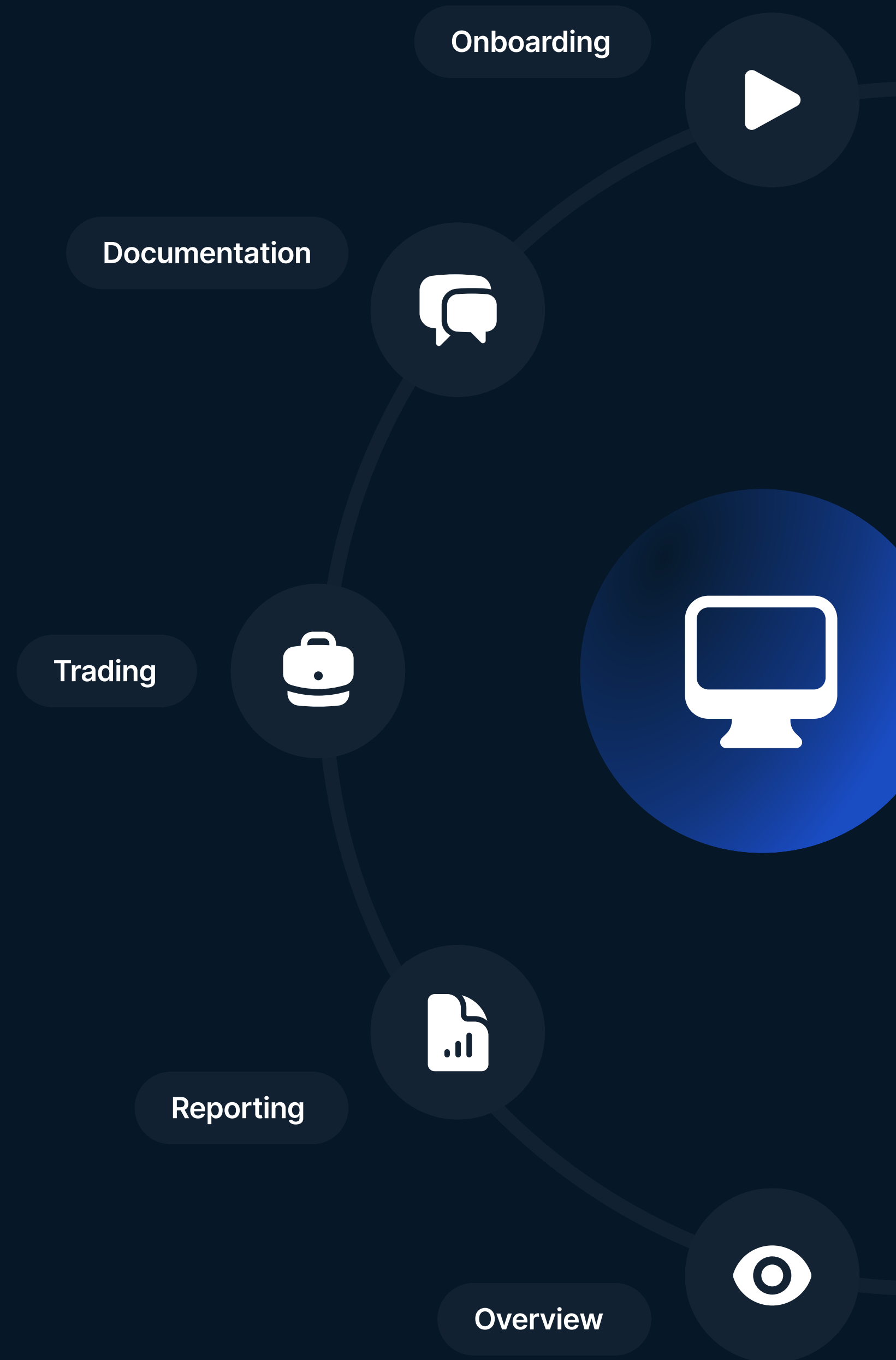
Integrated  
E-sign



# Holistic.

All business crucial aspects in one system.  
Never suffer from fragmented data again.

- One system for all your needs
- Compliance, planning and portfolios
- Automatic reuse of data
- Open banking (PSD2)





# Compliance.

Always stay compliant and up to date with regulations.

- Onboarding & KYC
- PEP, AML, Sanction screening
- Investment advisory
- Integrated reporting
- Integrated e-sign



PEP-screening



Sanctions



AML

## Tasks



### KYC

4th March

Waiting for sign

### Discretionary Mandate

12th March

Waiting for sign

### Depot Agreement

12th March

Waiting for sign



Sign agreement



Scenario

Pension



# Planning.

Comprehensive financial planning capabilities with execution close at hand.

- Build client trust
- Simulate events, assets, cashflow
- Compare different scenarios
- Personalised plans for every client



House  
1.25 M€



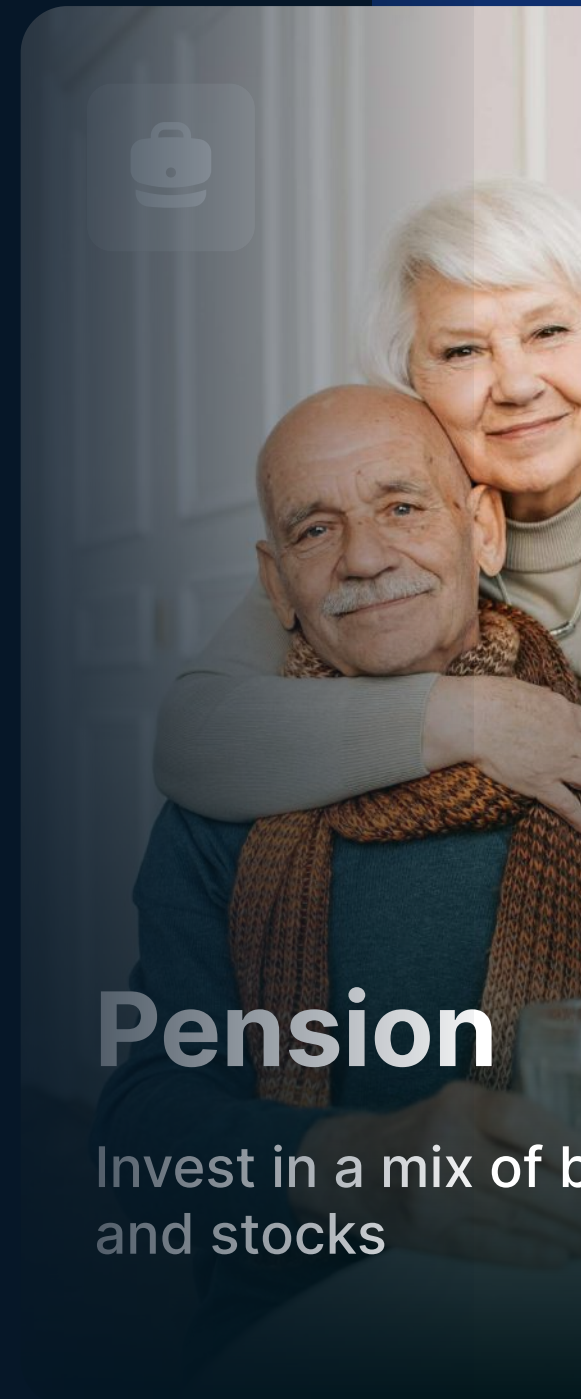




# Trading.

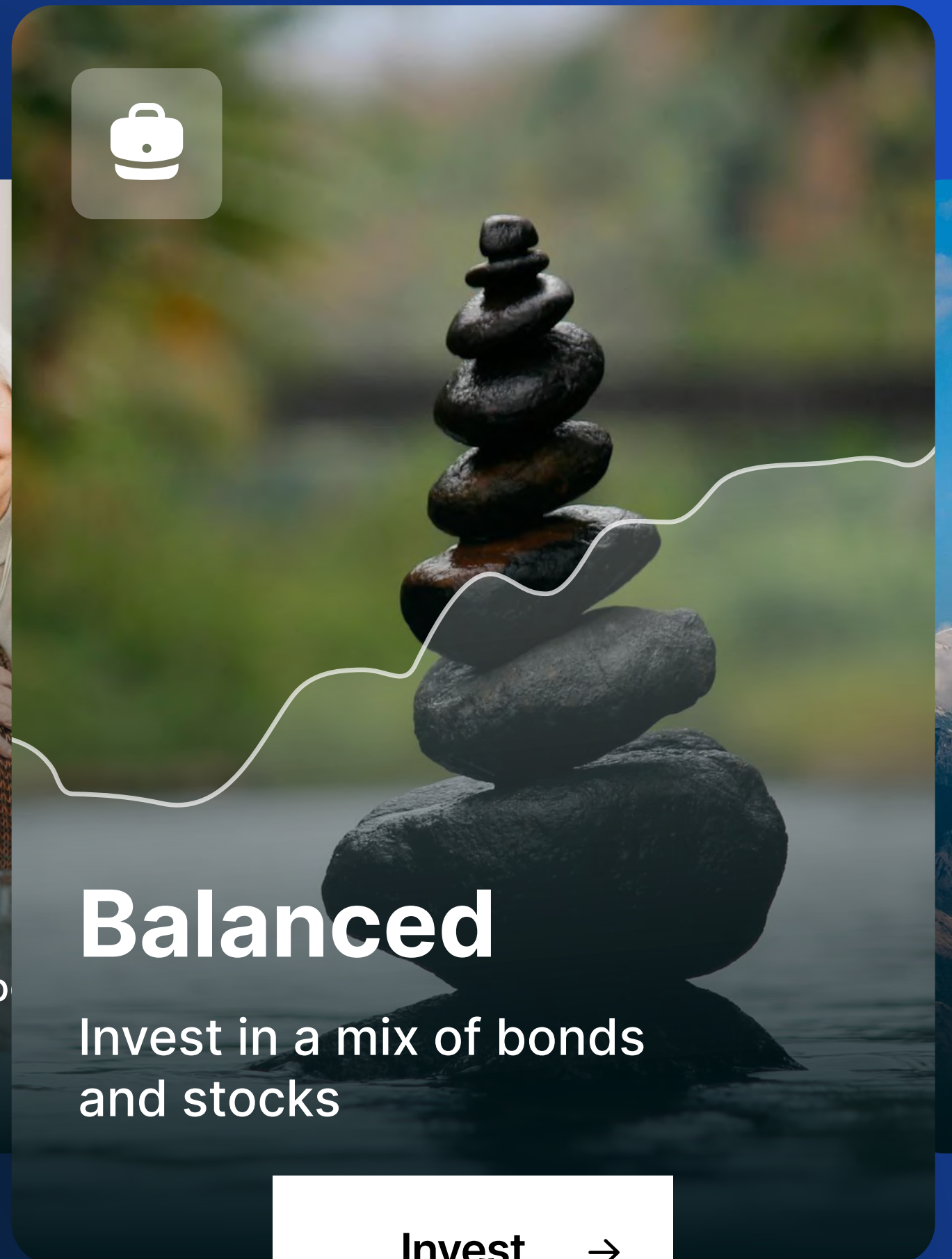
Integrated trading that allows you to initiate and settle trades.

- Trade 100k+ mutual funds, ETFs and stocks
- Create model portfolios
- Automatically rebalance multiple portfolios at once
- Integrated with client bank accounts for secure deposits & withdrawals



## Pension

Invest in a mix of b  
and stocks



## Balanced

Invest in a mix of bonds  
and stocks

Invest →



## Long-term

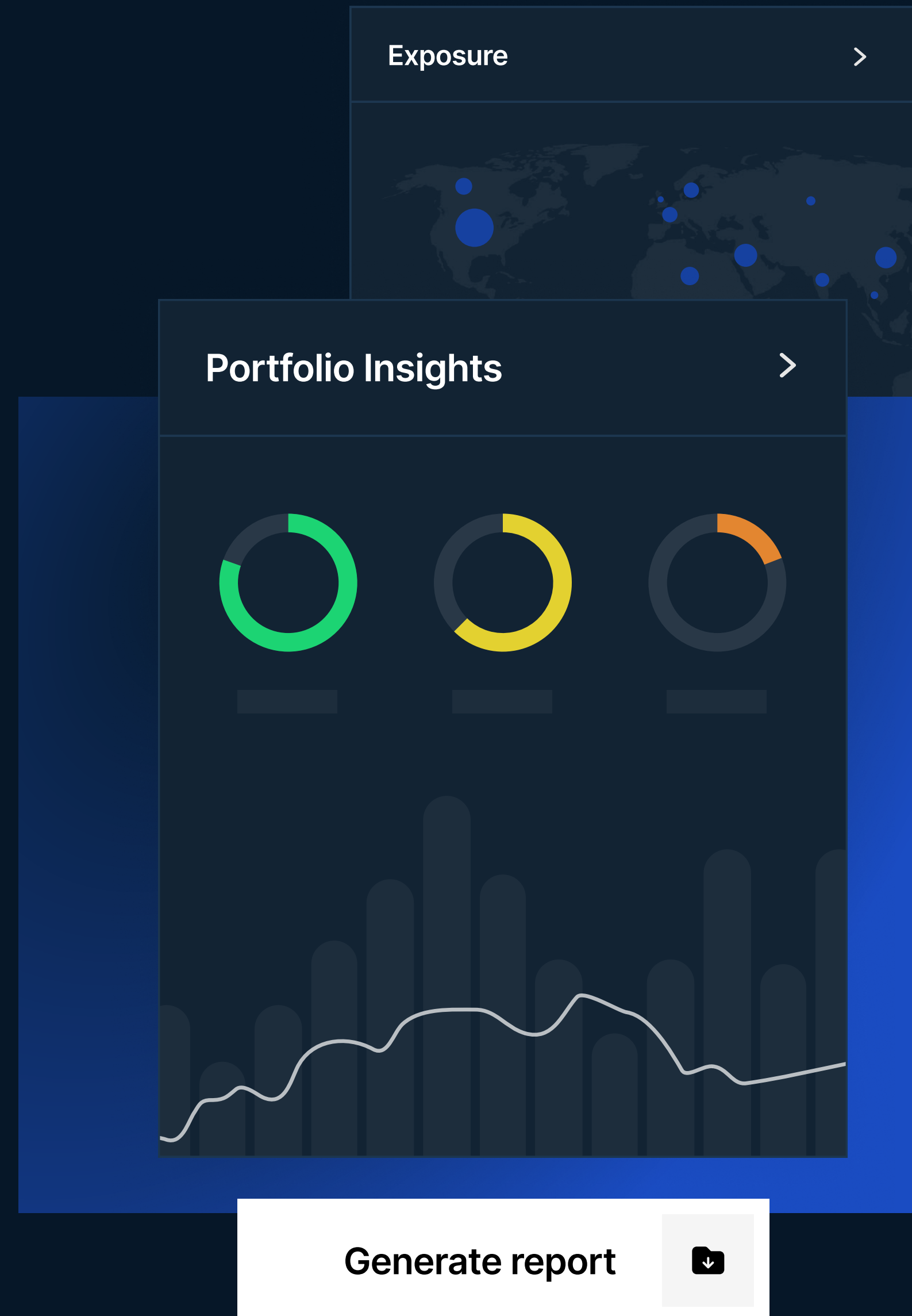
Invest  
and s



# Reporting.

Full support for internal and external reporting. Build trust and gain new insights.

- Report, drill down and analyze your client's wealth
- Improved customer experience
- Automation saves time and costs
- Ready-made reports and built in distribution





# Custody.

We have partnered with Evida to provide you complete and integrated custody services in one package.

- Complete custody services
- Insurance, depots, trading capabilities
- Tied agent services
- Extensive background in compliance, wealth management and custody



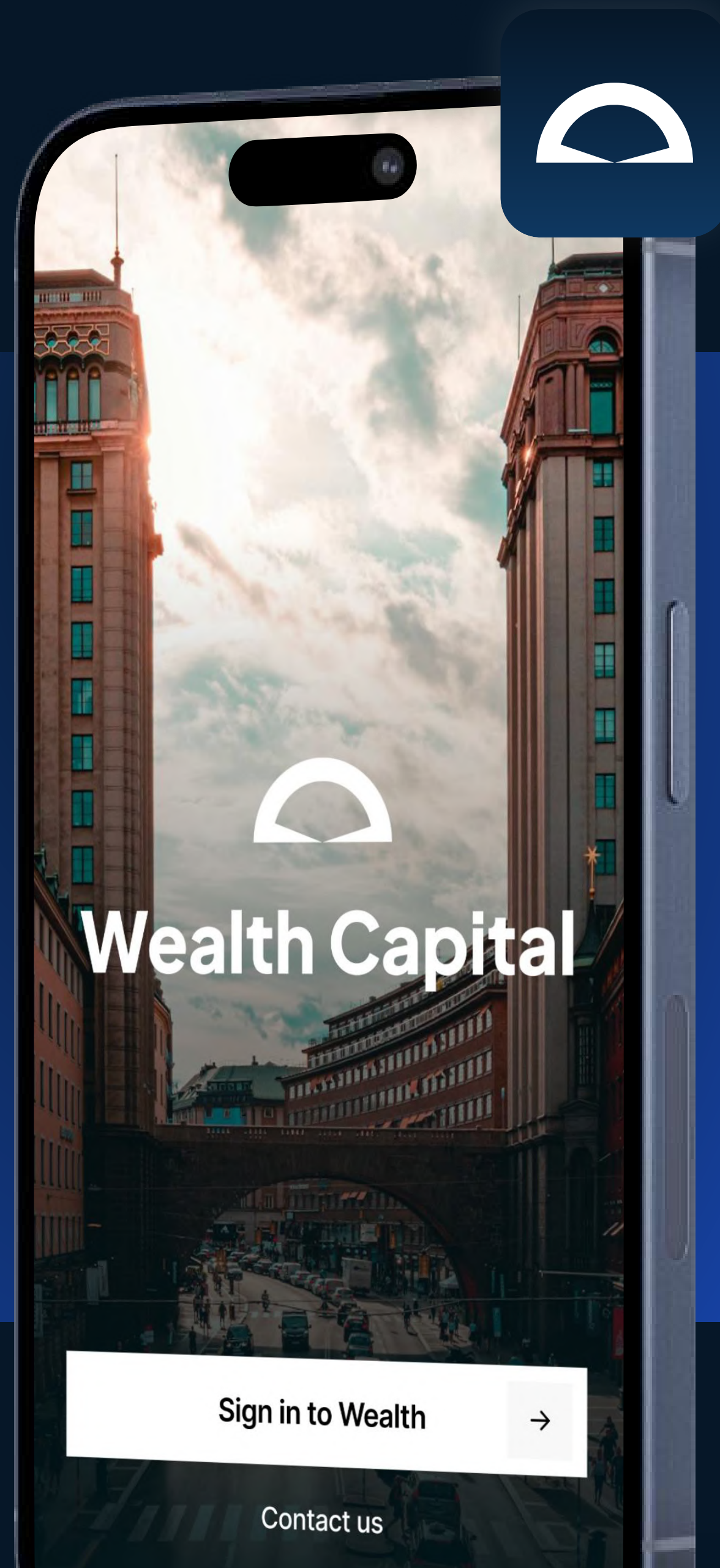




# Mobile.

Nurture your client relationships and stay top of mind with Alwy Mobile.

- Stay top of mind
- Sign orders & agreements on the go
- Stay up to date on balances
- Full technology suite for your clients



# European finance is changing.

With DORA, FIDA, eIDAS and MIFID 3 all around the corner, it's never been more important for a wealth manager to team up with a tech partner that not only can do tech but also compliance.

With Alwy you receive full future compliance coverage out of the box as we, as a licensed entity, will follow these regulations in 19+ markets as well as having our own AISP license under FIDA.

After providing feedback on the implementation of these regulations we can say that the changes coming are bigger than most people can comprehend, and it will change European finance forever.



**DORA**



**FIDA**



**eIDAS**



**MIFID 3**



# Get started today.

We help you throughout the entire process.  
No technical integration needed on your end,  
we set everything up for you.

Step 1  
**Free demo**

Step 2  
**Discovery  
Session**

Step 3  
**Offer**

Step 4  
**Onboarding &  
Training**



**Book a free demo today**



[alwy.com/business](https://alwy.com/business)



**Christoffer Long, CEO**

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