



Check6

Mastering your wealth management

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February, 2019

check6wealth.com

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Check6 is a data company
which turns connected
financial information into
insights for control to master
wealth management

Private banks aim to

Private banks have several goals in order to meet the needs of highly sophisticated clientele. They seek to differentiate themselves and remain competitive and innovative in today's fast paced environment.



Offer innovative digital products

In order to continuously meet the demands of key clients, the need for digital offerings is increasingly important



Increase Assets Under Management

Reducing the churn by increasing stickiness of your offering.



Fulfil their role as Trusted Advisor

It is imperative to secure and improve the relationship between the institution and existing or new clients and thereby increase loyalty.



Increase revenue

Due to increasing cost structures, changes to fees and legislation, the level of churn indicate that the private banking business model is shifting.

Check6 offers innovative digital tools to connect bankable and non-bankable financial information for 360-degree overview. This provides insights and power to master your wealth management.

24/7

Daily data delivery

100%

Automated digital service

365_{days}

Doesn't matter where you are or at what time, you can access your data

#1

Data enrichment service

Digital is personal

The Check6 portal is the flexible and secure environment for advisors and clients

Multi-factor authentication

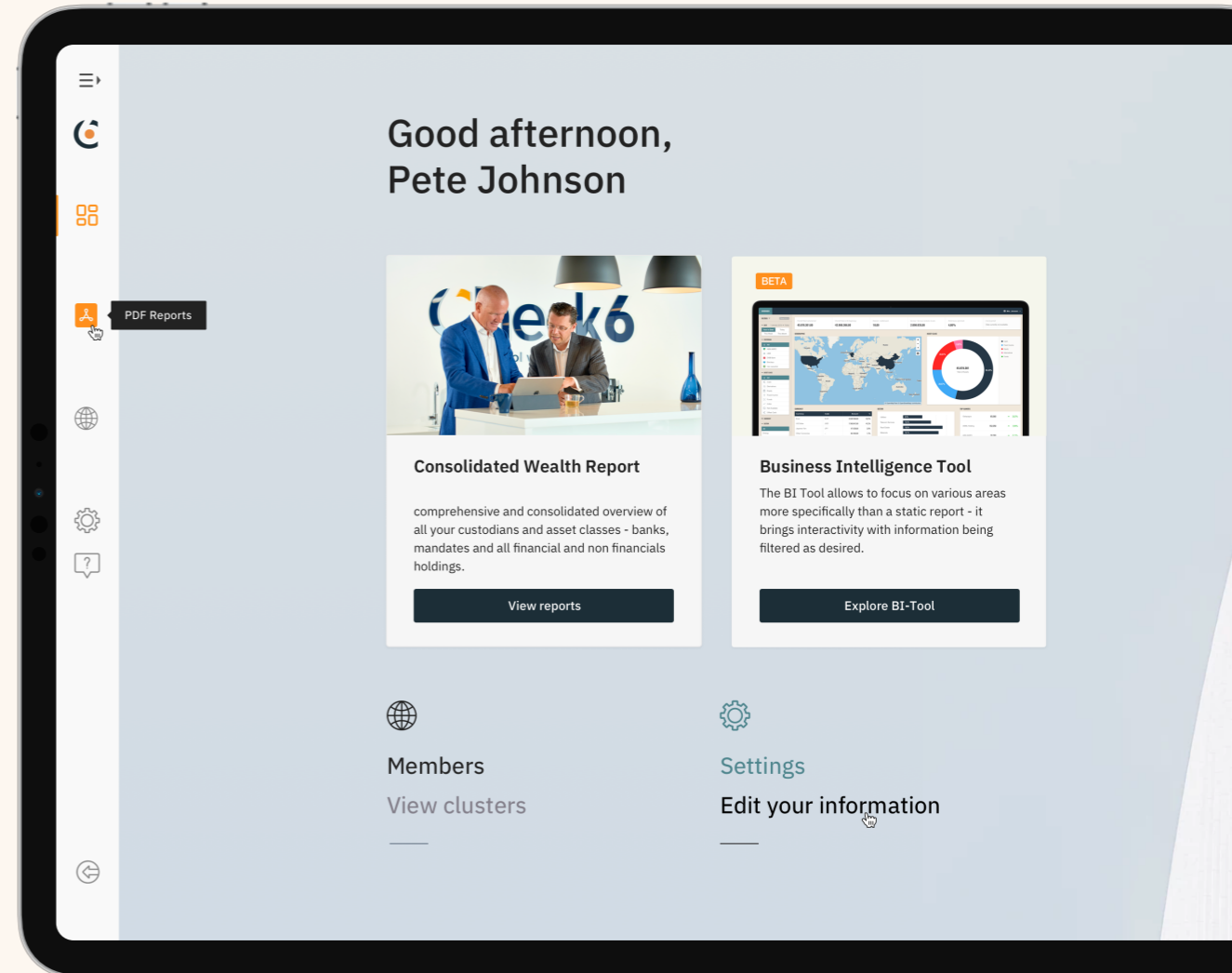
All client data is secure with our multi-factor authentication, encryption and anonymisation.

Efficient Relationship Management

Sharing and communicating with your clients via a smart and user-friendly platform.

Centralised finances

All information about the wealth of your customers in one environment.



Business Intelligence Tool

Offering up-to-date insight into the total wealth of your customers 24/7. It enables interactive functions to apply multiple filters to specific information for focussed analysis and strategic decision making.

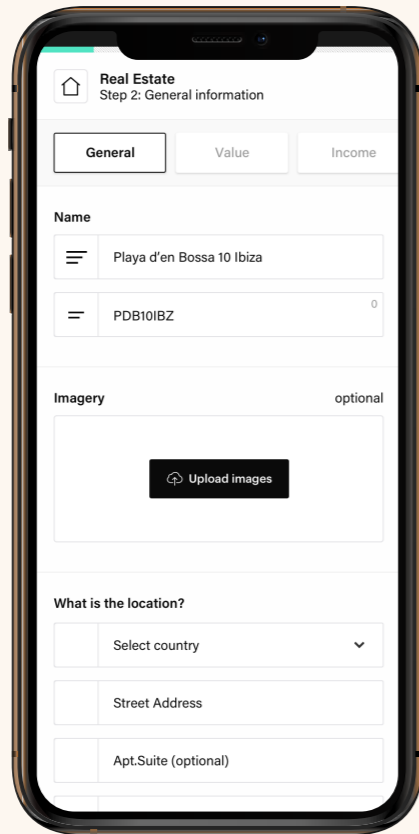
VIEW DEMO



Private assets

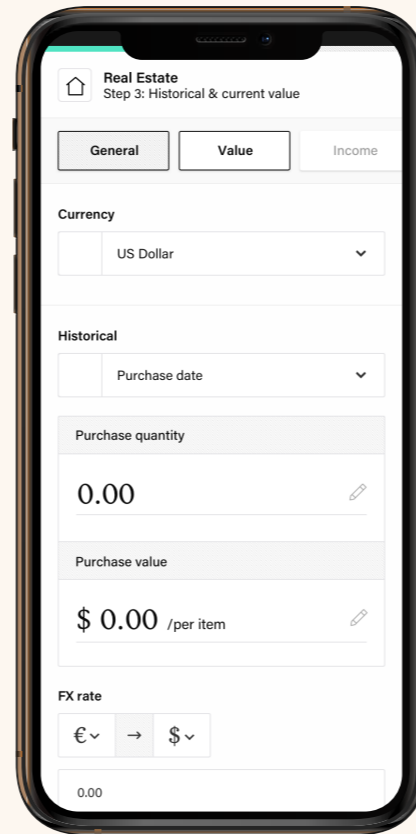
For a complete 360° degree overview.

The private assets module offers a safe, private, innovative and user-friendly way to add, edit and view your private assets with just a few clicks.



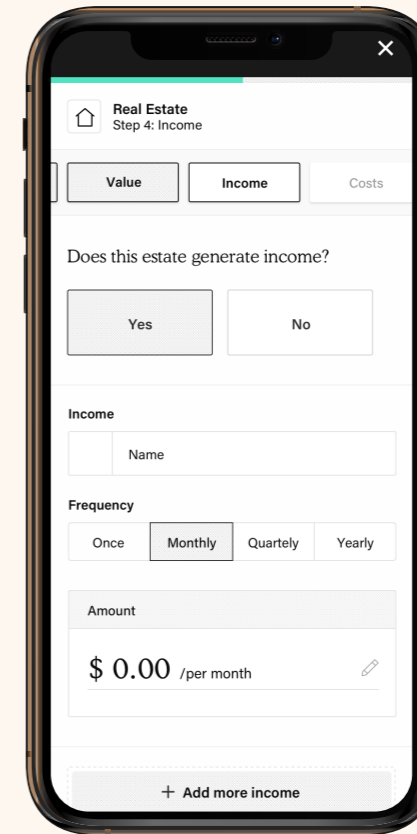
General information.

Enter information about the asset
Example: Name, Location, Imagery and Description



Asset value.

Add data points such as the FX rate, purchase value and quantity

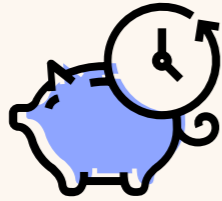


Income & costs.

Add income generated by this asset and any associated costs

Mastering wealth management with Check6

Check6 solutions provide private banks and their trusted advisors the user-friendly, digital tools necessary for directly communicating with clients. Thereby keeping clients well informed and satisfied for retention and growth of the client base.



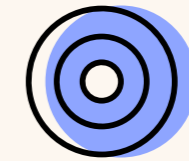
Time saving

Via the Check6 portal, easily and efficiently communicate with clients.



Trustworthy

Regain your role as the trusted advisor by utilising up-to-date, accurate, completely connected financials of your clients.



Accuracy

By combining all financial information, be it bankable or non-bankable, the 360-degree view allows for the ultimate wealth advisory

40 + interfaces connected.

Check6 is proud to be connected with over 65 prestigious custodians. These invaluable connections power the Check6 multi-custodian platform.

 <p>Deutsche Bank</p>	 <p>UBS</p>	 <p>Morgan Stanley</p>	 <p>ING</p>	 <p>CREDIT SUISSE</p>	 <p>ABN·AMRO</p>
 <p>J.P.Morgan</p>	 <p>HSBC</p>	 <p>BNP PARIBAS</p>	 <p>Julius Bär</p>	 <p>The Royal Bank of Scotland</p>	 <p>Goldman Sachs</p>



NO. OF CLIENTS	1-500	501-5000	5000+
Base price B.I.Tool	250	125	50
<i>Includes:</i>			
Consolidation & Look-through	✓	✓	✓
1 Custodian	✓	✓	✓
Private Asset Module	✓	✓	✓
<i>Optional:</i>			
Extra Custodian	250	200	75
B.I. Tool - Performance	200	150	90
B.I. Tool - Cost	200	150	90
B.I. Tool - Risk	200	150	90
PDF Monthly Report	350	350	350

A young woman with long dark hair, wearing a blue plaid shirt and a dark apron, is smiling and looking at a tablet held by an older woman with short grey hair. The older woman is wearing a white shirt and a dark apron. They are in a greenhouse filled with rows of potted plants, including many bright pink and red flowers. The background shows the structure of the greenhouse with translucent panels.

**Are you ready
to offer your
clients a 360
wealth overview?**

check6wealth.com



Did we sparked your interest?

Contact us!

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