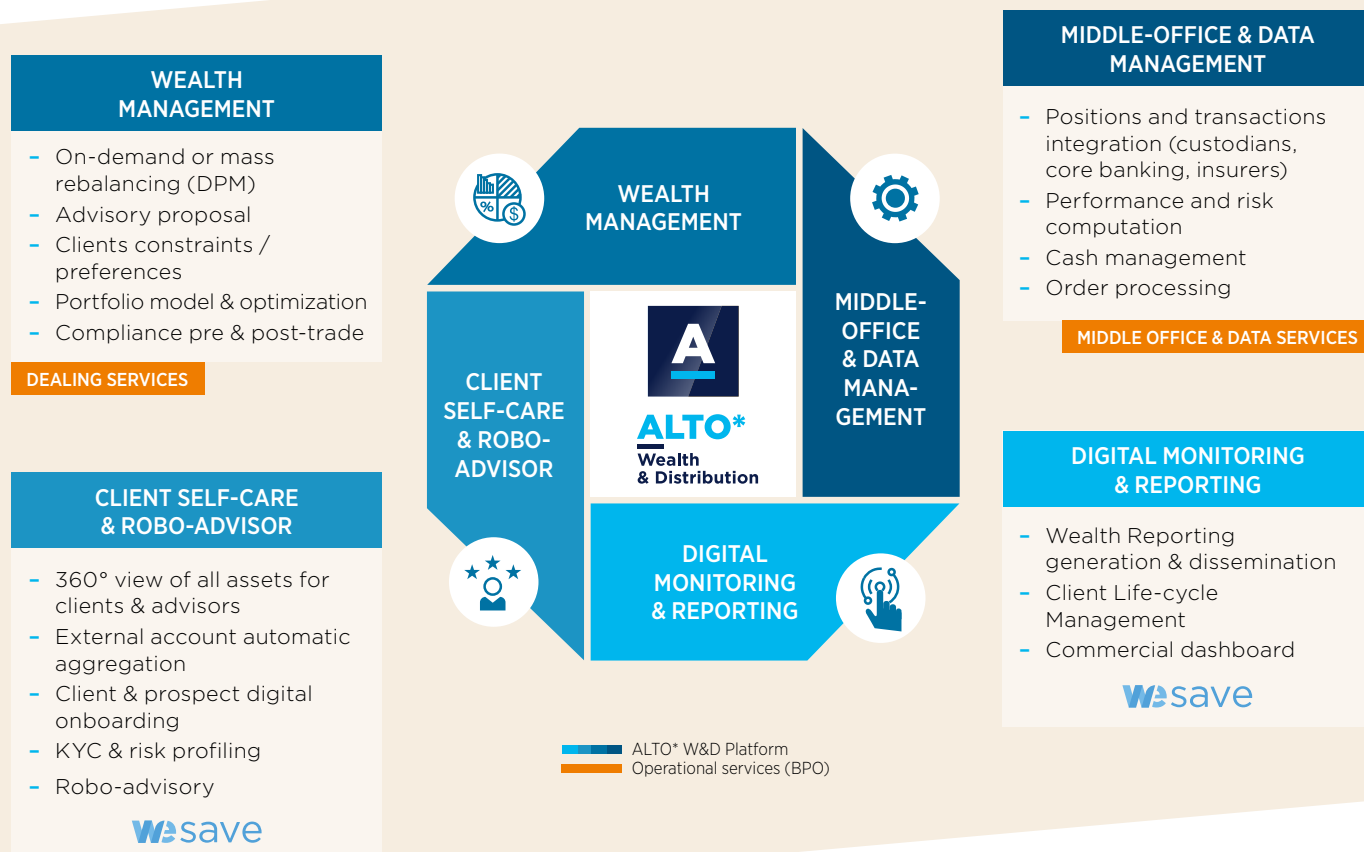




Retail banks, wealth managers and their clients benefit from the business expertise of the ALTO\* Wealth and Distribution platform to manage Advisory and Discretionary portfolio management solutions. The platform is flexible, modular and available in a cloud/SaaS<sup>1</sup> mode.



## key figures<sup>2</sup>

**+200,000** DPM mandates

**+60,000** users

**+150** data sources

## Amundi Technology **promise** and **guarantee** with ALTO\* Wealth & Distribution



\*Amundi Leading Technologies & Operations  
1. SaaS : Software-as-a-service  
2. Amundi figures as of 31/12/2020

## Key ALTO\* Wealth & Distribution differentiators and advantages

### Wealth management expertise

- **Automation helping** advisors to focus on high-value activities
- **Customer satisfaction** by offering a true **digital experience**
- **Fully automated and industrialized allocations** through portfolio model replication or tailored-made allocation optimized by client preferences

### Self-care & Robo-advisor

- Financial and real-estate assets **aggregation** with investment accounts breakdown
- **Robo-Advisor** functionalities enabling client to manage portfolio independently

### Industrial, flexible and modular

- Intelligent compromise between an industrial and modular model for **ALTO\* modules selection** depending on client's operating model
- Connectivity with **a wide data ecosystem**: market data sources, custodians, core banking systems, insurers...

### Agile, driven by experience

- Flexible at **every users fingertips with dedicated user interfaces** for advisors, relationship managers and end-clients
- **Agile organization** to improve the platform quickly with innovation and new functionalities deployed in **"continuous delivery"** mode

### Cloud and open source

- **100% Cloud technology** solutions on a private infrastructure with no need for infrastructure update
- Connectivity with client's existing SI (**core banking, CRM...**)
- **Open architecture platform powered through APIs**

### Turnkey solution

- **Proven implementation model** supporting easy adoption and integration
- Leverage Amundi **international footprint** all over the world with local support teams

## Amundi Technology

Amundi Technology offers innovative technology and operational services to support clients reshaping their operating model. The solutions proposed aim to meet the needs of all savings and asset management actors: asset managers, asset owners, distributors, wealth managers and asset servicers. The technology platforms provide clients with adaptive solutions enabling them to focus on their core business.

**WeSave** WeSave, a fintech 100% part of Amundi, has created a unique and twofold offer:

- fully digital customer journey, aggregation, KYC, account opening and financial products monitoring solutions,
- robo-advice technologies offered through discretionary portfolio management and advisory portfolio management offers, for individuals and professionals.

The WeSave suite of solutions is available entirely in API, to best meet the needs of professionals in the financial industry.

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\*Amundi Leading Technologies & Operations

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