



Delio



UBS FoF: Introducing Delio

Creating Private Investment Solutions

David Newman - COO & Co-Founder



Two Key Challenges For Wealth Management

2



Differentiation



Relevancy

Working With Leading Financial Institutions



Coutts

Building digital private asset proposition

Design and delivery of digital solution to connect top tier clients for private investing, with further future roll out across wider banking group.



UKBAA

Infrastructure partner for all UK angel networks

Partner for UKBAA and its 180+ angel network members. Running central marketplace and launching spin off a member platforms in 2017/18.



ING

Commercial platform roll out across Benelux

ING and Delio are partnering to roll out platforms with ING and partners across Benelux, Germany and France. Target launch in Q4 of 20 platforms.

The logo for ALIGN17, with the text 'ALIGN17' in a black box, a horizontal rainbow bar below it, and a thin black border around the box.

Align17

Global marketplace for impact financing

Founding Technology Partner of Align17. Launched at this years World Economic Forum, other Founding partners include Hamilton Lane, UBS, Linklaters, World Bank & PwC.

Key Product Modules Built Around You



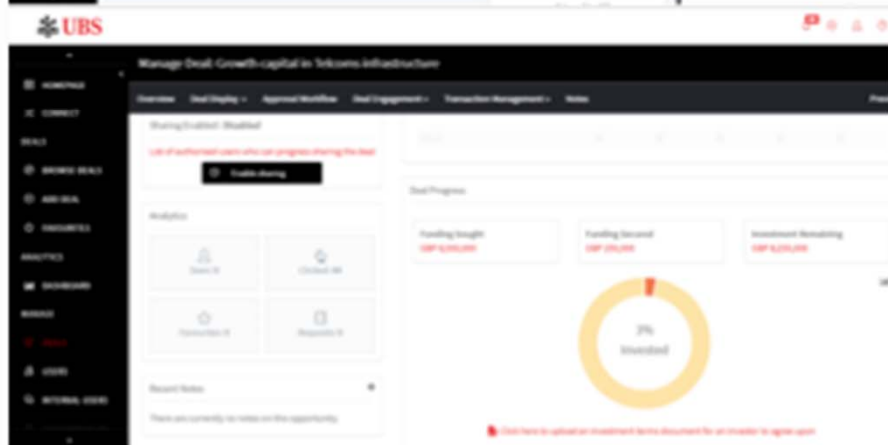
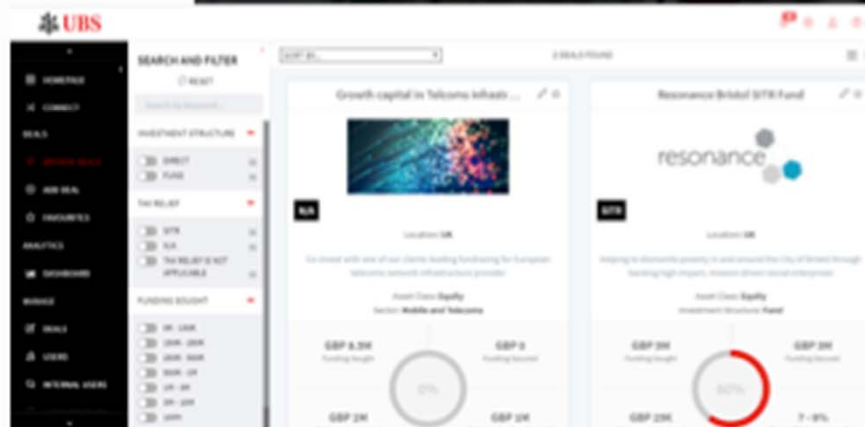
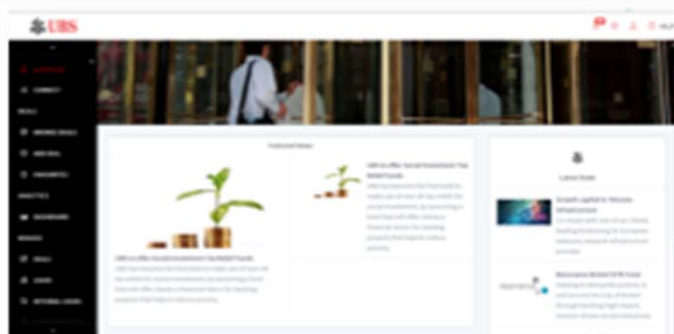
A White Label Platform Solution

Designed hand in hand with key stakeholders to meet the needs of you, your clients and your regulators.

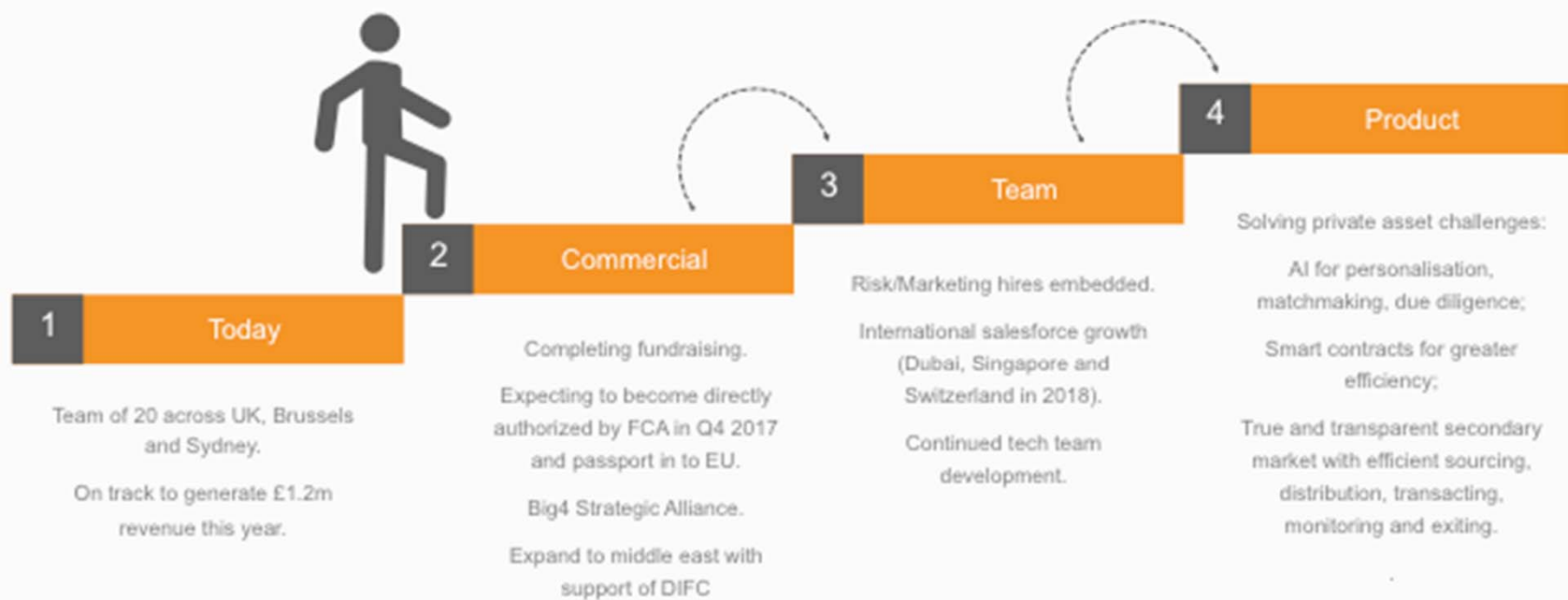
Experienced in building solutions for:

- UHNW Investment Clubs, Family Office Syndication;
- Impact Investment Offerings;
- Institutional Solutions Group distribution tools;
- Private Equity & UCIS Fund Distribution;
- EIS & VCT Propositions;
- AltFi Aggregation.

ISG use case for UBS?



What Lies Ahead



Summary

PROPOSITION

Solution built in collaboration with leading institutions to solve critical problems of differentiation & relevancy in wealth management.

PIONEERING

Seamlessly combines configurability with connectivity to overcome all challenges of institution driven private asset solutions. Working on AI and Blockchain for private markets.

POTENTIAL

Big market. Big Impact. UBS can utilise day one to improve client relationships.



PRACTICAL

Ready to deploy solution, working with existing top tier banks in Europe, Middle East & Asia. Variety of integration options.

PLAN

Executing on clear roadmap for product, team and model evolution.

PROPOSER

Highly experienced team with wide range of skillsets establishing themselves as leading white label private asset solution.

Future of Finance EMEA (London) final

Questions?