

3rd-eyes





# UBS Future of Finance Challenge



**Regional Finalist 2017**

The UBS Future  
of Finance Challenge



This document contains privileged and confidential information intended only for the use of the addressee. If you are not the intended recipient, any disclosure, copying, distribution or any action taken in response to this document is prohibited and unlawful.

STRICTLY PRIVATE & CONFIDENTIAL © 2017

## Who are we



---

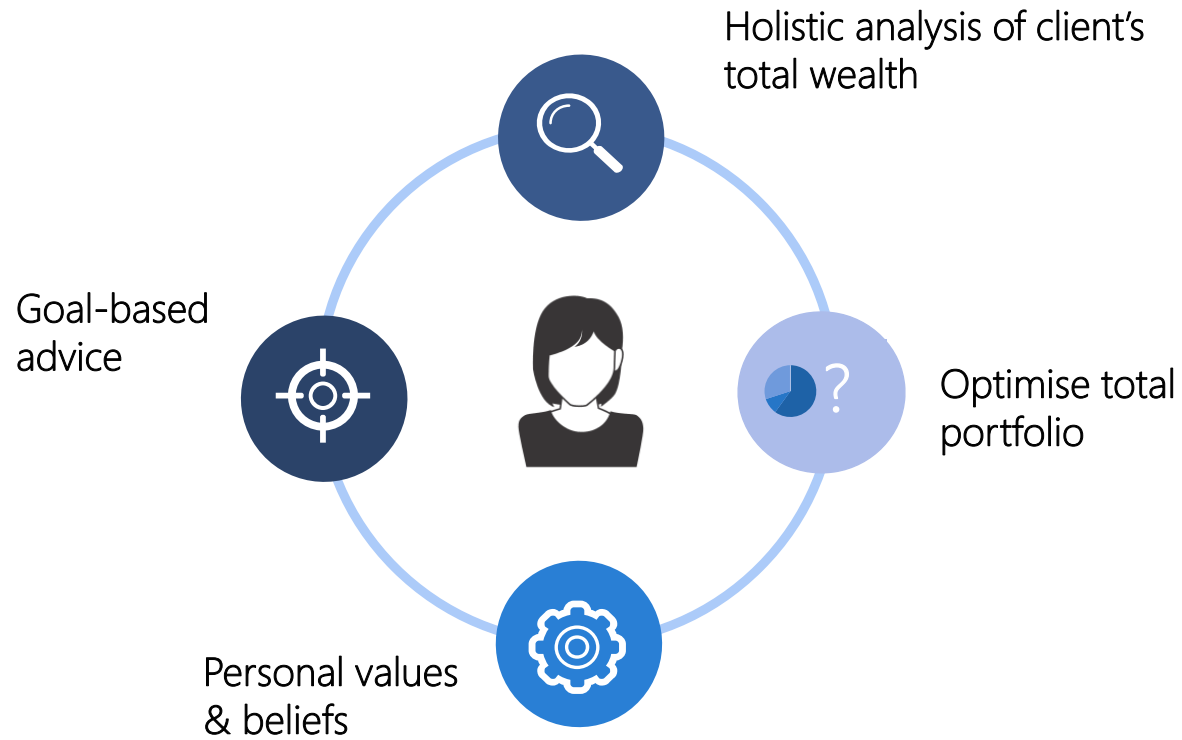
### Our mission is to help you to enable your clients to reach their financial goals

- 3rd-eyes offers novel digital wealth planning & advisory software to financial services companies.
- We offer financial services companies a methodology otherwise only available to institutional multi-billion euro portfolios, adapted to address private clients' needs.

# The challenge



Your clients expect client-centric advice



# Our advisory process



We offer a complete advisory process in 4 stand alone modules

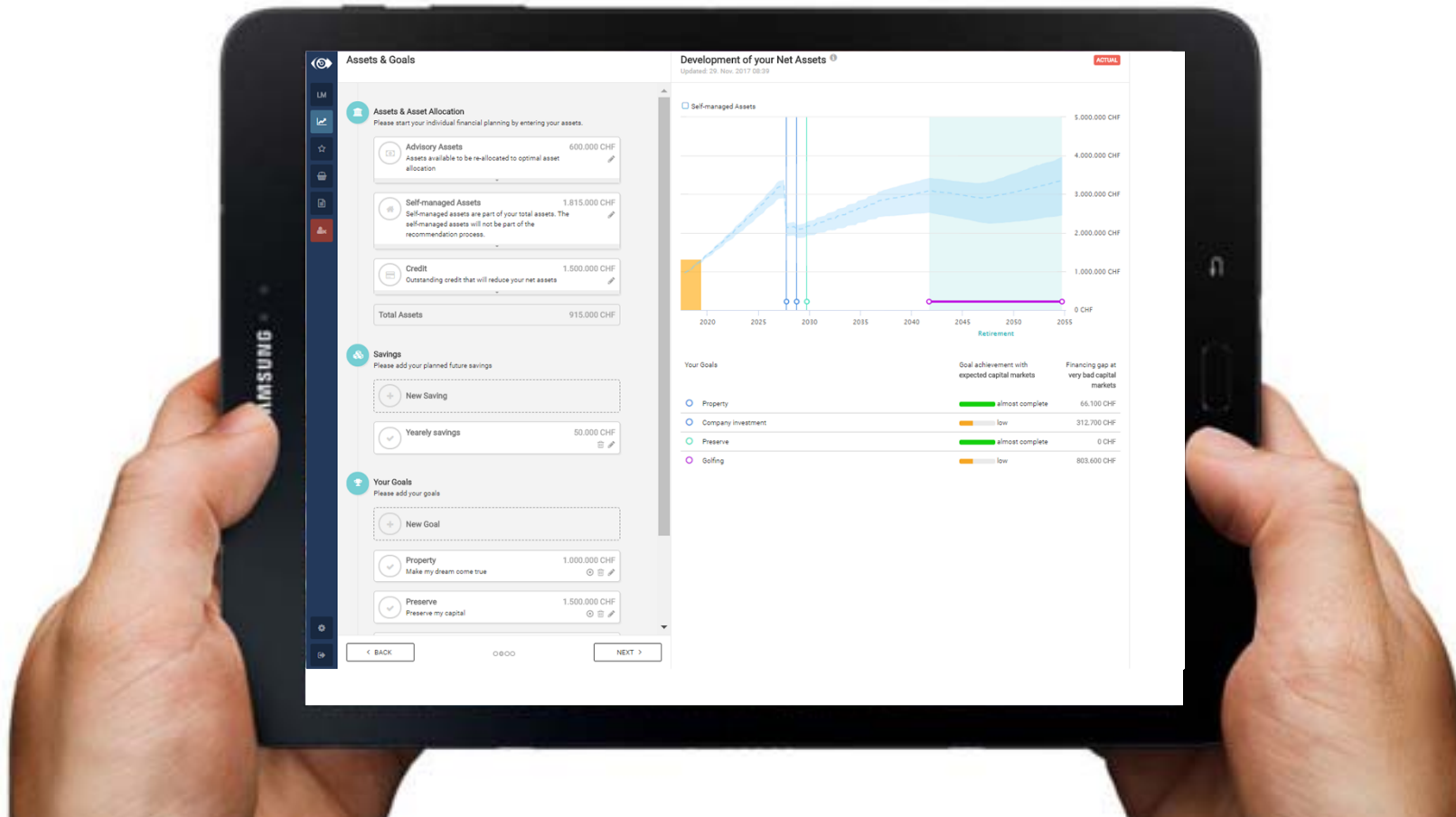
Analyse the specific situation

Check client's goals achievements

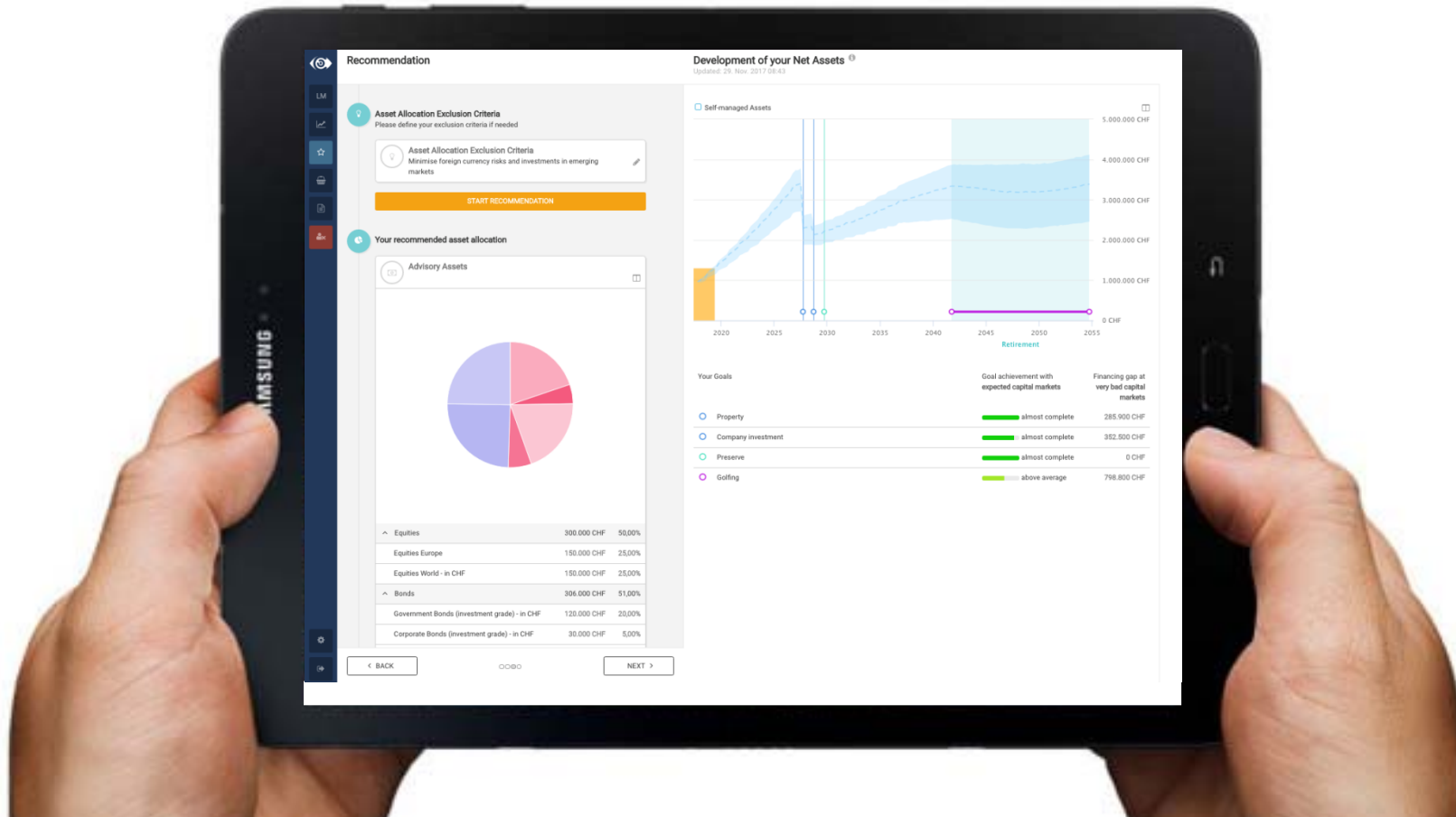
Optimise client's goals achievements

Build individual portfolio on values & beliefs

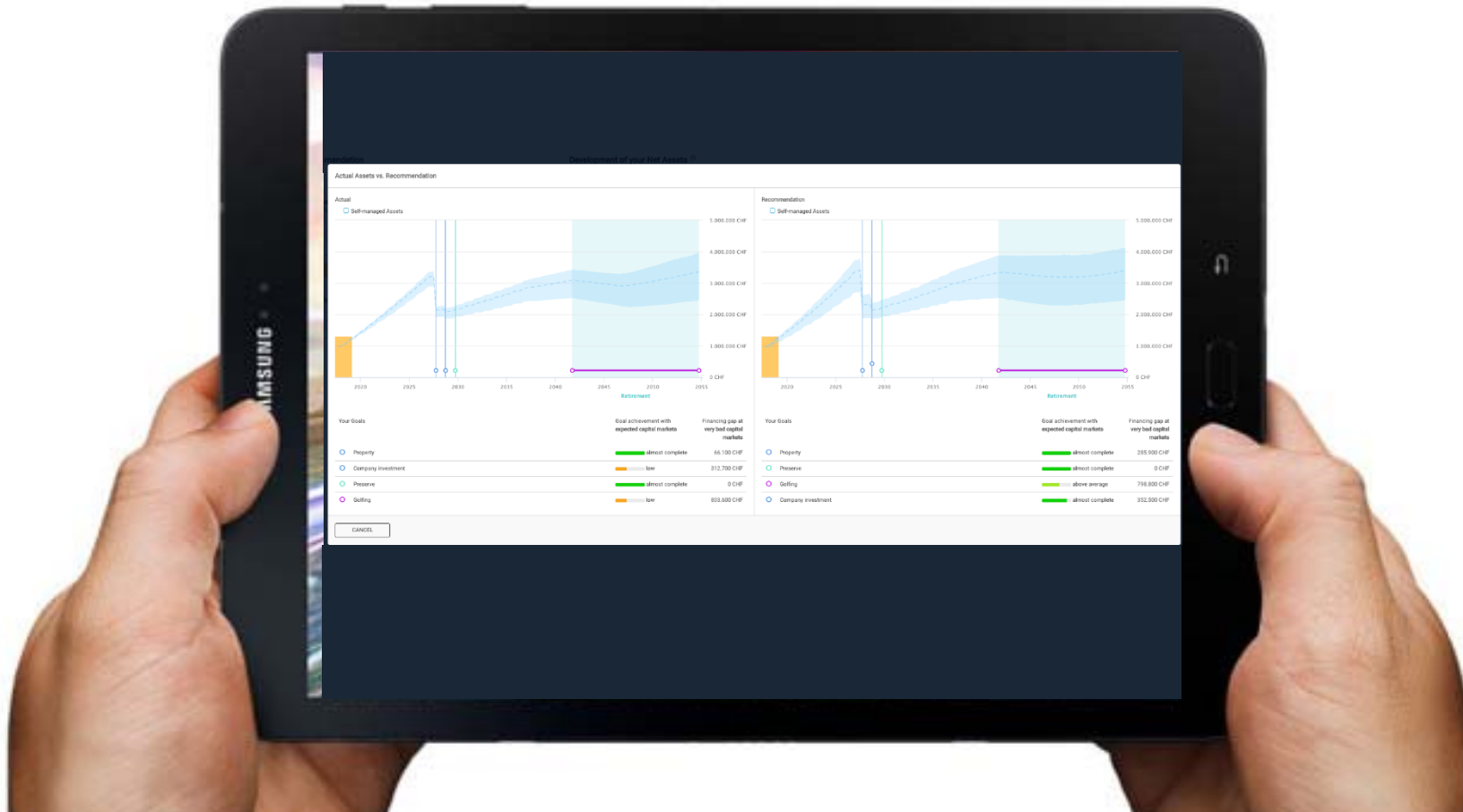
# Analyse specific client situation and goals



# Optimize client's allocation

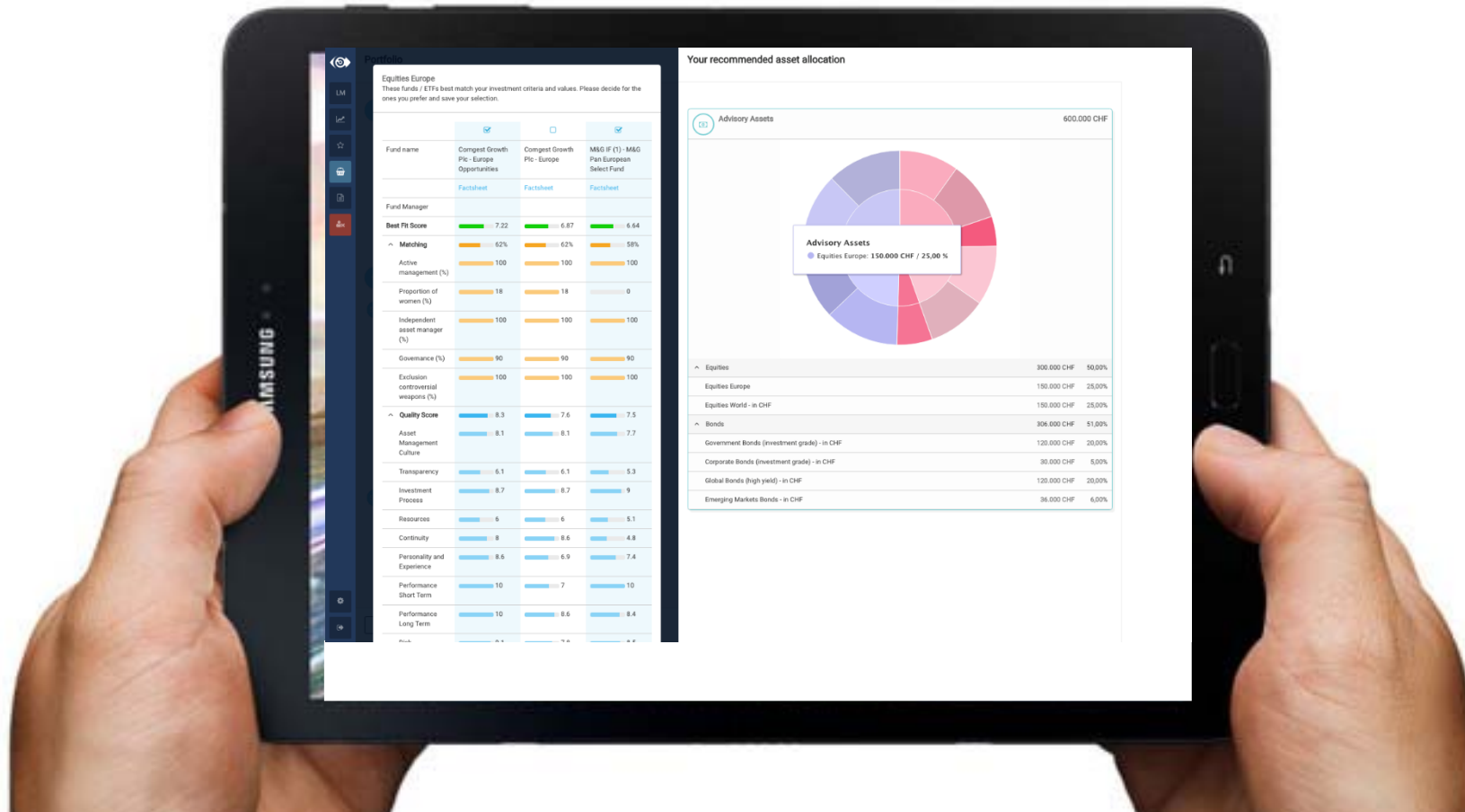


# Improve client's situation





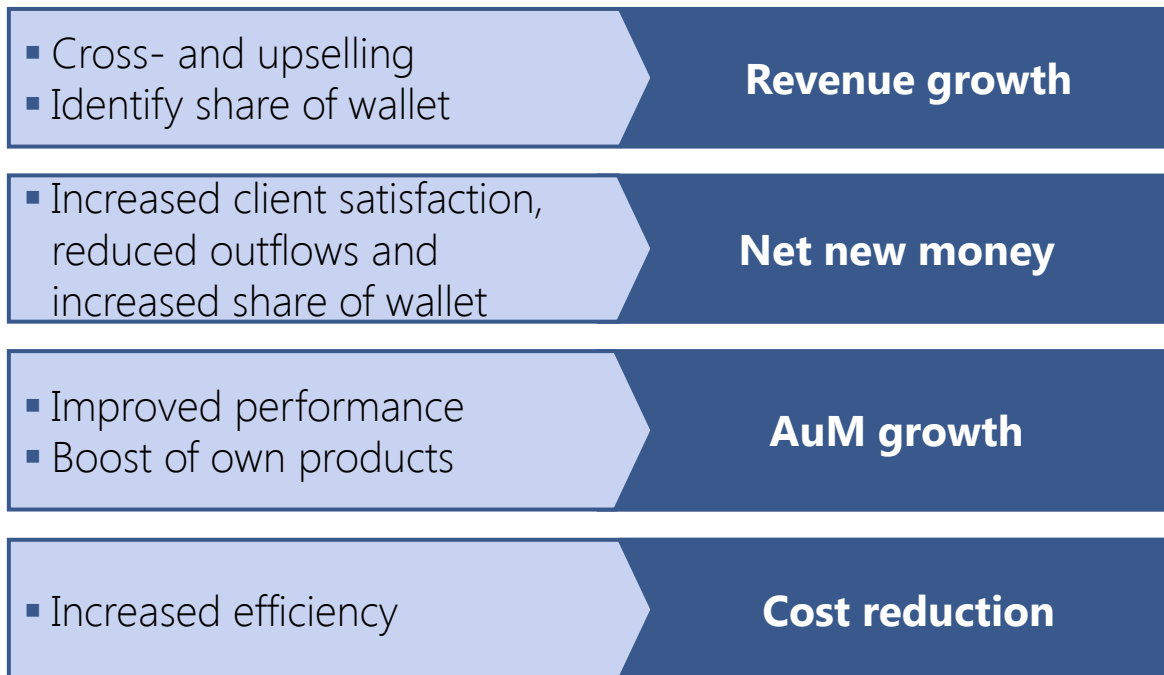
# Build portfolio based on clients' preferences



# Our solution creates sustainable value to UBS



## 3rd-eyes digital advisory process addresses key industry value drivers



## Use cases



### From private, retail banks and external asset managers client advisors to end client



Client advisors

- Licensed to private & retail banks, external asset managers, family offices



Self-directed bank clients

- Licensed to banks that wish to offer investment advice to their clients in a fully automated way

# What can we do together with UBS?

---



## Focus on Wealth Management

- Incorporate our navigation system in UBS advisory process:
  - For client advisors
  - For self directed clients via the UBS eBanking platform



[www.3rd-eyes.com](http://www.3rd-eyes.com)

**Look forward to hearing from you**

**Stephanie Feigt, CFA | Chief Executive Officer**

**Rodrigo Amandi, PhD | Chief Operating Officer**