

White Paper

Robo-Advisory as-a-Service

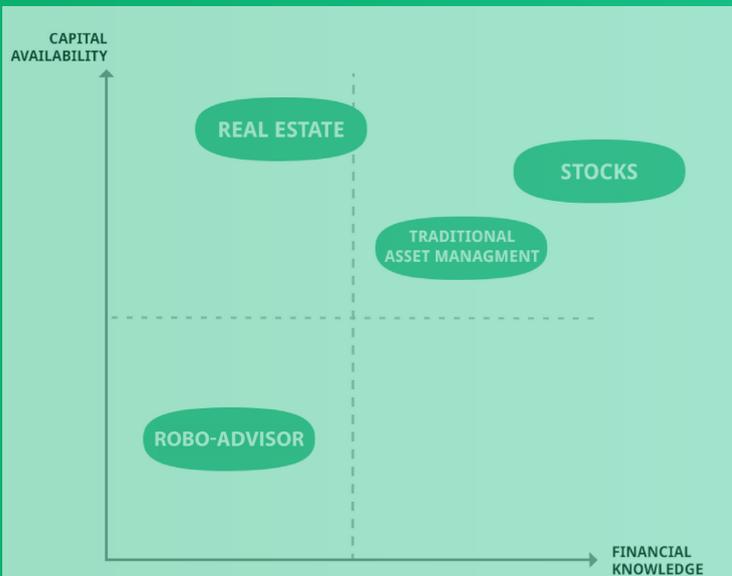
DIGITAL WEALTH
MANAGEMENT SOLUTIONS

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Introduction

Robo-Advisors are digital wealth management platforms that enable banks and financial institutions to deliver superior customer experience. The technology is used to digitalise their product offerings and replace manual processes.



In
45
sec.



You have a unique
personalised portfolio

85%

of our respondents think
this may be a good solution
to their needs



What is Robo-Advisory?

Robo-Advisors are digital platforms that provide automated, algorithm-driven financial planning services with little to no human supervision.



What is FinTech?

Financial technology (FinTech) is used to describe new tech that seeks to improve and automate the delivery and use of financial services.



How does it work?

1

BE OPEN ABOUT YOUR DIGITAL CHALLENGES

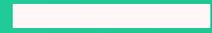
What is it that you are trying to achieve digitally? Make sure you communicate it well to the Robo-Advisor.

2

COLLABORATION IS KEY

Robo-Advisors generally have advanced technology. From another hand, each bank has a particular digital goal. A tailored solution is needed to allow implementation of that technology into the existing banking infrastructure.

How does it work?



3

**IMPLEMENTATION
MAY TAKE 4-6
MONTHS**

Banks have the option to either obtain the technology through a white label partnership with a B2B Robo-Advisor or build the technology themselves. The later one generally takes 12 months or more to build.



4

**CONTINUES
INNOVATION**

Technology keeps on developing and so should your digital offerings. Staying ahead of competition is only possible if continues innovation is embraced.

BENEFITS OF THE ROBO-ADVISORY

COMPLETELY DIGITAL

Digitalise your wealth management solutions.

EFFICIENT ADVISORY

Lower acquisition cost and improve service to clients.

WEB AND MOBILE

Reach clients on any device. It's 100% digital!

SIMPLE SETUP

Easy white label.
Tailor to your own needs.

SUPERIOR DESIGN

Keep it simple.
Clients love it!

HIGHLY COMPATIBLE

Integrate with any system.

Q1: WHAT IS PROVIDED BY THE ROBO-ADVISOR?

Each bank is different, and so does the customisation of the Robo-Advisory modules. The Robo-Advisory scope is generally covered in the following areas: goal setting, risk assessment, automatic recommendation, simultaneous execution, dynamic reporting.

Q2: HOW DOES THE INTEGRATION WORK?

The white label solution is provided by an API integration with the bank systems.

Q3: WHAT ARE THE EXPECTED RESULTS?

Some of the main goals a bank pursue through a Robo-Advisory are:

- Reach younger demographics
- Lower client acquisition cost
- Up-sale and increase lifetime value per client
- Digitalise product offerings
- Cut advisory and operational costs

Q4: HOW LONG DOES IT TAKE TO INTEGRATE?

It really depends on the scope but it generally takes 4-to-6 months to fully integrate and launch the solution.

Q5: WHAT IS THE COST?

Robo-Advisors are SaaS companies and therefore the cost for the bank is a combination of installation and subscription fee. Generally, these fees are multiple times lower than developing a robo-advisor in-house.

Contact Us



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