



Digital solutions
for **wealth management**
businesses





Digital Wealth Solutions

Wealth investment platform

A better way to manage your customers and their interactions

In the digital world we live in today, investors expect online solutions designed for usability through which they can access and manage their investments.

Online processes help customers easily navigate the sometimes onerous compliance requirements, while reducing the time and cost associated with compliance.

Invsta provides an investment management platform designed to excite your customers, while simplifying customer management and satisfying compliance requirements.

Delight your customers, reduce costs, and bring your wealth management business into the digital age with our range of online wealth management solutions.

A platform for wealth management

Customer Interface

With a slick design and great functionality, the Invsta platform makes it easy to attract and retain clients. Select from a range of functionality to deliver an online solution that fits with your business model, and allows your customers to interact with their investment

Management Portal

Through the platform you are provided with your own management portal, storing investor details and compliance documentation. Note taking, document storage, and report generation facilitate the advice process, with the online processes reducing your administration burden, saving you time and money.

Easy Compliance

Our online account opening process easily captures, verifies, and stores all KYC and AML information, reducing the cost and time you spend on each new customer. Ongoing compliance requirements are taken care of through our automated alert system.



Built by professionals

The Invsta team have over 35 years of financial market experience, combined with more than 30 years of technology development. We know the finance side of things, and we know the technology side of it too. "FinTech", is at our very core, it's what we live and breathe.

Over the last 3 years we've developed a range of cutting edge fintech products, including robo-advice platforms, consumer budgeting software, and cryptocurrency investment platform solutions. We are focused to empower smarter investing through innovative technology.

An interface that customers love

Invsta has been developed with the end investor in mind. Our platform helps to cut through the complexities often associated with investing, providing customers with an experience that will keep them coming back for more.

- **Simple account opening**

Our quick and simple online account creation means no more arduous application forms or complex processes, we also capture and verify AML & KYC requirements.

- **Easy to invest**

After opening an account, customers can browse investment options and make an investment with the click of a button.

- **Manage & top up**

Customers can check into their account at any stage to track performance and other details, get updates from you, and easily add to their investment.



Simple management & compliance

The Invsta platform simplifies customer management and ongoing compliance requirements.

This can be customized to suit your current processes, and integrate with existing service providers to deliver the features that are important to your business.

- **Customer account creation**
- **Integrated AML & KYC**
- **Ongoing customer compliance**
- **Investment via click of a button**
- **Set minimum investment amounts**
- **Customer communications**
- **Management reporting**
- **Mobile app**

“I love how quick and easy it was.”

- Kadri

“I just want to say that I love your site.”

- Janion

“I love the easy to manage website and dashboard.”

- Adam

Talk to us for more information, and to discuss how we can bring your financial service business into the digital age and delight your customers with our range of digital wealth management solutions.



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Visit our website
for more information

www.invsta.com