



# **Robo-advice** solutions for financial service providers





## Digital Wealth Solutions

### **Robo-advice platform**

Automated financial advice for a more efficient advice process

Online, automated financial advice (robo-advice) has become a popular tool for investors who would otherwise not have access to financial advice.

Automated advice allows customers around the world to cost effectively access financial advice at a time and place that suits them, and significantly reduces the cost associated with providing financial advice.

Invsta provides a robo-advice platform designed to attract and retain a new generation of investor, that also simplifies customer management and satisfies compliance requirements.

Open up a new customer channel and more efficiently service existing customers by bringing your financial service business into the digital age with our range of robo-advice solutions.

# A platform for online advice

## Client Discovery

With a slick design and great functionality, customers find it easy to navigate through the online process that collects important information required to provide financial advice. This includes risk profiling, goal setting, and other compliance requirements such as KYC & AML verification.

## Advice & Ongoing Management

Intelligent algorithms process the client data and provide recommended advice to the client. After confirming the advice and confirming their investment, clients can login to the platform to easily track, manage, and adjust their investments.

## Management Portal

Through the platform you are provided with your own management portal, storing investor details, records of advice and compliance documentation. Re-balancing, note taking, document storage, and report generation complete the advice process.



## **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

The Invsta robo-advice platform has been developed with the end investor in mind. Our intelligent platform simplifies the advice process, and cuts through the complexities often associated with investment, 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.

- **Instant advice**

Customers are provided with instant online advice based on the information they've provided. Customers can view suggested advice and investments, make adjustments, and after accepting the advice, they can invest at the click of a button.

- **Manage & track**

Customers can check into their account at any stage to track performance, make adjustments, top up their account, and receive updated advice if their situation changes.



## **Efficient advice & management**

The Invsta platform simplifies the advice process, customer management and ongoing compliance. This can be customized to fit with a range of automated advice models, from complete online advice to a hybrid approach.

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

**“I love how quick and easy it was to start investing.”**

*- 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 about our robo-advice platform, and how an automated advice model could integrate with your existing business to create better efficiencies and pave the way for a new type of customer.



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Visit our website  
for more information

**www.invsta.com**