

A new calling in Wealth Managers for new times





The best part about working with EasyView is the transparent conversations we have. We work together as one team, building digital capabilities and transforming our organization for the digital age.

——— An International IWM CEO

Who is EasyView?



US\$10B+

Assets under reporting



50+

Dedicated employees



US\$5M+

In product development
over the last 3 years



Worldwide

Support and services
in all time zones

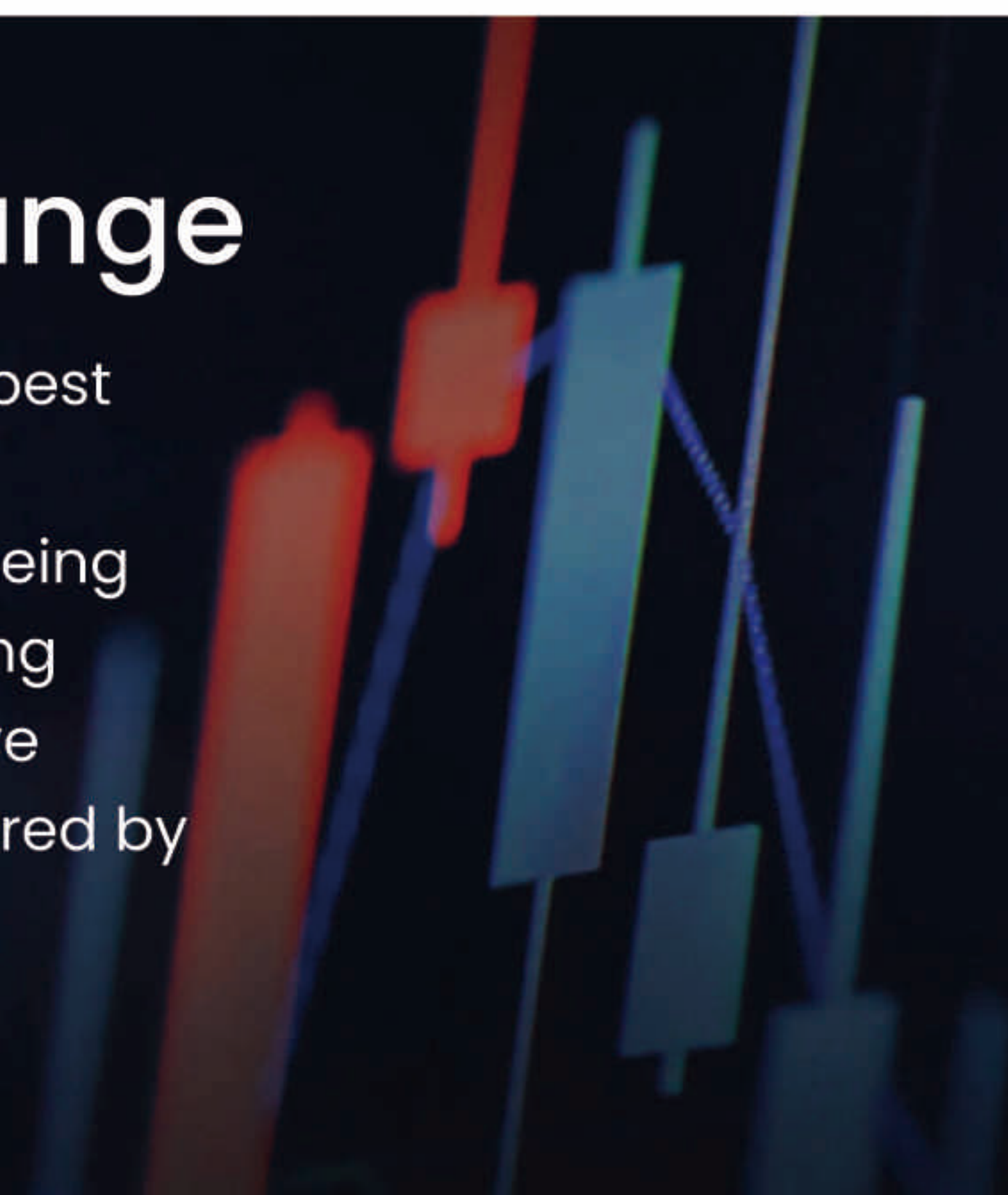
EasyView is a SaaS company based in Hong Kong. We provide digital solutions to the Private Wealth Management industry across APAC to drive digital transformation. Our industry-leading digital solutions are currently leveraged by Private Banks, Independent Wealth Managers, and Family Offices.

We were founded by leaders with decades of experience in the wealth management space, so we know the challenges Wealth Managers face: we faced these same challenges every day for years, which is why we set out to solve them. Our priority is giving Wealth Managers the tools they need to be more accurate, more efficient, and more effective at delivering premium services to their clients.



Answering to the signals of change

EasyView is empowering Wealth Managers to incorporate the best components of both digitization and human-based financial advisory. The wealth management competitive landscape is being reshaped by a range of forces including significant wealth being transferred to the second generation of younger, digitally native millennials with rising expectations, new ways of working powered by technology, fast regulatory change, geopolitical volatility and aggressive new entrants with efficient business models.





There is a clear gap in Asia for a powerful, compelling, sophisticated-yet-easy-to-use digital wealth management offering aimed at the region's emerging and growing wealthy.

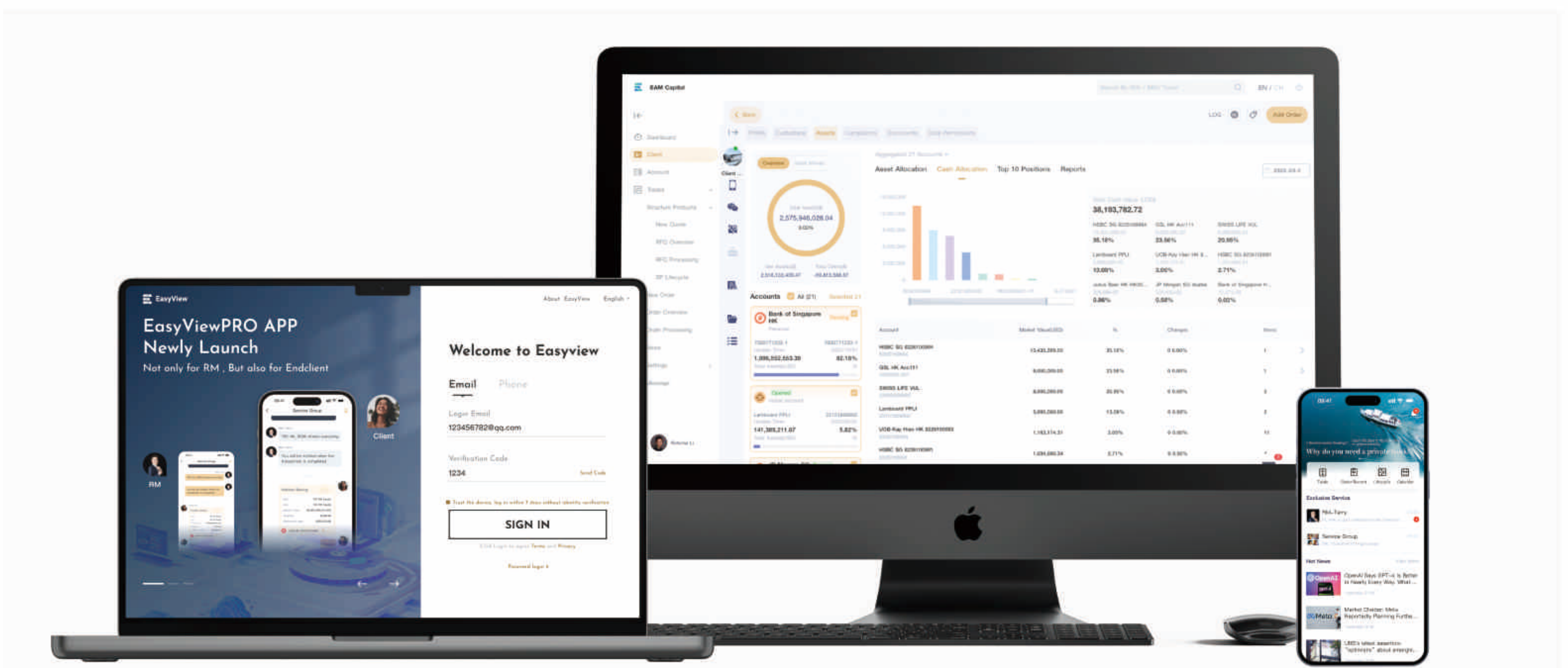
—— Larry Campbell, Head of Financial Services Strategy, KPMG APAC

Solutions for Wealth Managers created by Wealth Managers

Many Wealth Managers now find themselves scrambling to adapt to the digitally changing environment in a bid to remain competitive and retain clients. Our years of experience in the industry along with feedback from our visionary clients shaped the development of EasyView solutions that tackle challenges of daily operations in an Independent Wealth Management firm, as well as encourages the scalability of the business.



Our industry-leading solutions are the result of 3+ years of development and investments – solutions that digitally empowers Wealth Managers and their clients along the entire value chain of wealth management.



Rethink what you can achieve with EasyView

Digitization has become prevalent, an expectation even! Today's UHNW clients already expect a seamless customer experience that is fast, convenient and intuitive, and tomorrow's customers will expect online tools and smartphone-based functionality to be standard. By reimagining the traditional siloed capabilities provided to Wealth Managers, EasyView opens the gates to a completely new set of formidable digital solutions armed with innovative capabilities.



Like other sectors, wealth management has been shaken up by the fintech revolution, with new players prioritizing speed, personalization and lower costs.



Solve challenges, improve performance and scale business

By facilitating operating leverage, data integrity, and risk mitigation, EasyView supports and enhances your current processes and improves their accuracy and efficiency. EasyView's technology leverages on best-in-class security certifications and allows users to carry on performing duties even from home without any business or region disruption.

Key benefits include

- Connected to almost real-time client data throughout the client lifecycle
- Scalability of business through best practice business processes, templates, and workflows
- Auditable logs and tracked interactions
- Move from manual tasks to higher level value-added for the UHNW clients
- Process management provides greater efficiencies in both operational and front-line processes
- Quality systemic controls with end-to-end digital workflows

Leverage digital capabilities for future succes

EasyView solutions are a customer-centric and enterprise- wide approach to digital transformation. It focuses on every business process, function and relationship on a single purpose, harnessing the power of technology. A winning operating model for future wealth management will likely require maturity across eight connected capabilities, featuring a customer-centric approach to digital transformation that connects front, middle and back offices – consistently meeting customer expectations while creating true business value.



Take precedence in the digital age with EasyView

Through investment in innovation and digitization, Wealth Managers can not only enhance efficiency through front-to-back automation and leaner processes, but also future-proof your businesses by upgrading client touch points and overhauling your value propositions.





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