Temenos Wealth Front Office

Temenos Wealth Front Office is a world-class portfolio management system specifically developed for advisors and portfolio managers, offering sophisticated functionality across profiling, modeling, performance reporting, risk and compliance, and more. With out-of-the-box workflows and extreme flexibility, the solution adapts to the needs of every financial institution and covers all client segments and asset classes.

How Wealth Front Office can help

Temenos Wealth Front Office boosts productivity and helps advisors and portfolio managers to act as a single source of truth, creating personalized advice based on their clients' needs. With unique depth, breadth and AI-based advice, the solution offers sophisticated functionality and flexibility that covers the full spectrum of clients from ultra-high-net-worth individuals (UHNWI) to the affluent segment across all geographies.

Personalized advisory and discretion management

Temenos Wealth Front Office supports personalized advice and discretionary management services with dedicated workflows. These include flexible ways to create asset allocation and model portfolios, including specific client constraints.

Efficiency

Temenos Wealth Front Office improves the portfolio and relationship managers' efficiency by highlighting immediate required actions via dashboards and alerting capabilities.

Robustness

Deployed across firms of all sizes and used worldwide, Temenos Wealth Front Office is an industry-tested solution for the most demanding institutions.

Depth & openness

Temenos Wealth Front Office's core functionalities go beyond traditional portfolio management features with performance attribution or AI-based advice. Leveraging an ecosystem of fintech partners, we are extending the scope of our solution with risk calculations, video conferencing, crypto custody etc.

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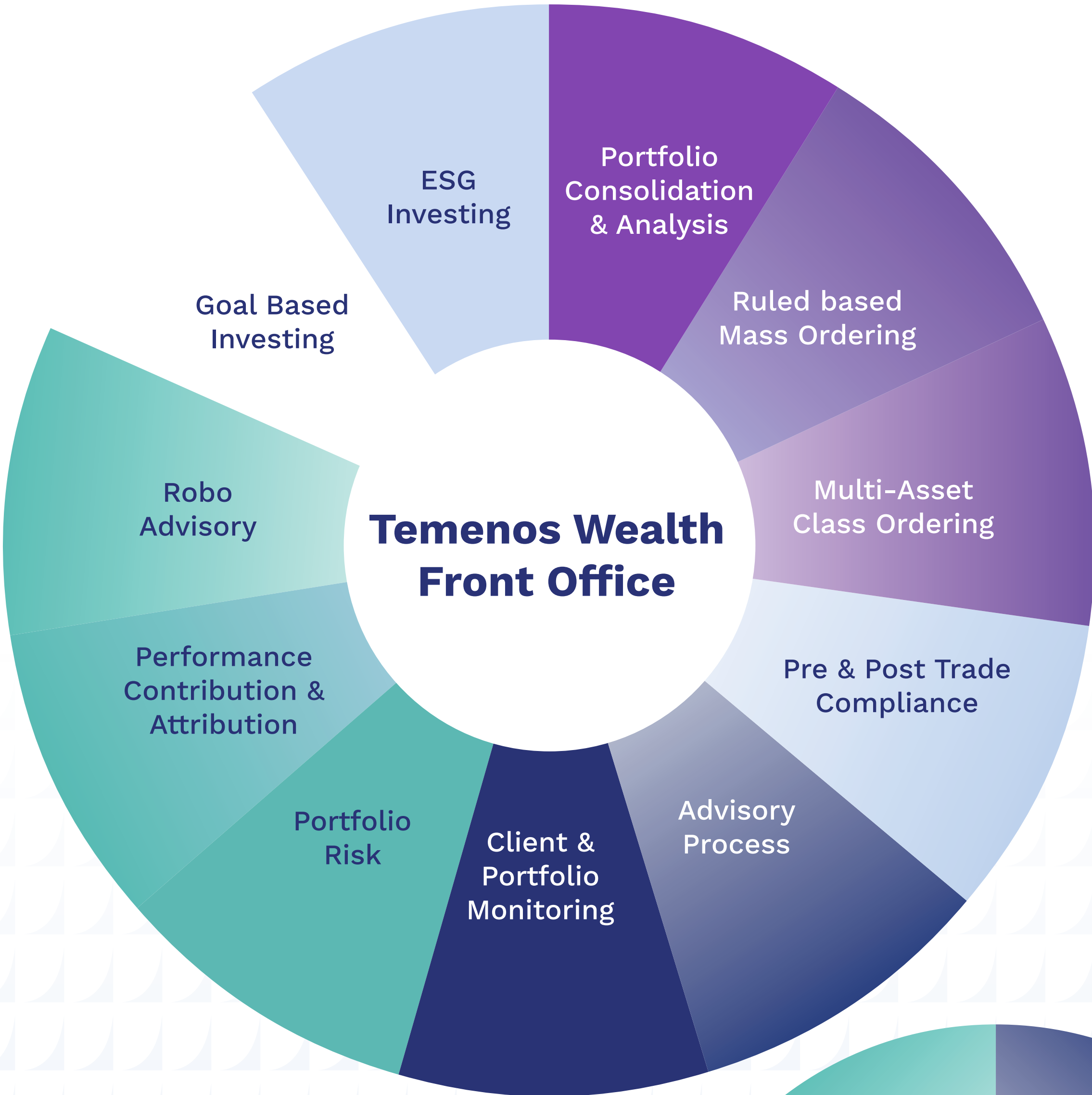
What our solution covers?

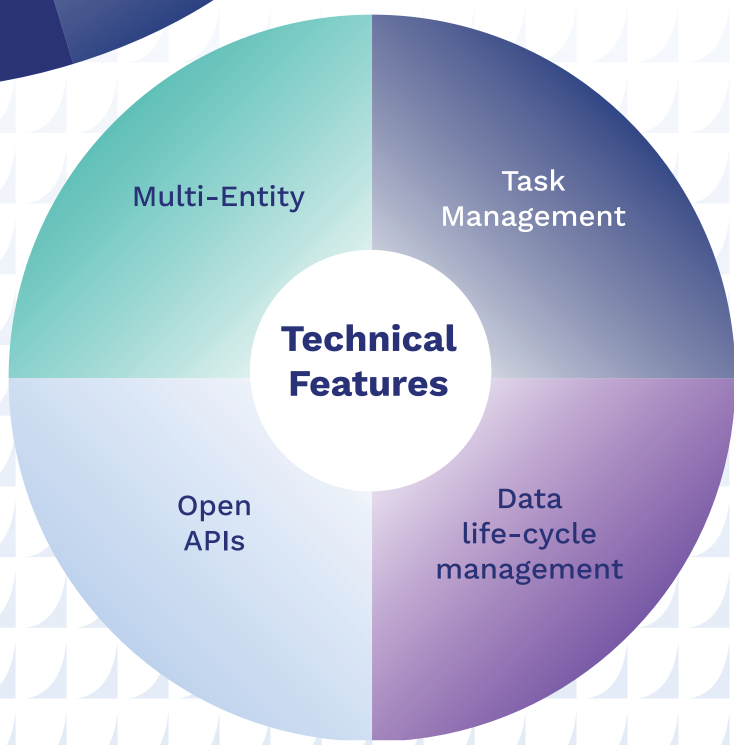
Temenos Wealth Front Office is a world-class portfolio management system specifically developed for advisors and portfolio managers, offering sophisticated functionality across profiling, modeling, performance reporting, risk and compliance and more. It is a flexible product offering with out-of-the-box workflows ready to operate based on any customer needs.

It powers portfolio management at scale and offers increased productivity by automating investments, order generation, and compliance checks. The offering covers the full spectrum of clients from UHNWI to the mass affluent. All standard asset classes are supported, including OTC derivatives, structured products, and digital assets like cryptocurrencies.

The solution boosts productivity by freeing relationship and portfolio managers from administrative tasks and unlocks revenue through powerful analytics modules. Pre-integrated, with the ecosystem and open APIs it offers flexibility and quicker time to market. It is easy to integrate with other Temenos Wealth components or existing banks' applications with a composable architecture. It is available on multiple Clouds, as SaaS, or on-premise.

Temenos Wealth Front Office capabilities and features





Benefits

Boosted productivity

- Dashboards tailored to advisors, portfolio managers and relationship managers
- Productivity features to service one or thousands of accounts in one go
- Automation for rule based mass ordering

Quicker time to market

- Pre-integrated ecosystem and open APIs
- Product flexibility
- Support for DevOps

Compliance risk mitigation

- Versatile pre-and post trade controls
- Country Models to tackle international and local regulations

Integration

- Real time, end-to-end integration
- Fix integration with dealing system
- Off the shelf adaptors to fintechs' solutions

Tailored cost model

- SaaS, Cloud and on-premise deployment
- Scale as you grow

What our customers say

By enabling our client and portfolio managers to do more of the client onboarding work directly in Temenos Wealth Front Office, we are cutting duplicated effort dramatically. Today, our employees can even collect client signatures digitally, which means there is no more need to shuffle paper between different parts of the business.

Marc Vanvilthoven,
Product Owner
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Temenos' people are key. Its services, products, and account management teams have really been outstanding. They have enabled us to be very agile and deliver with speed and confidence. That was exemplified when the bank pivoted to concentrate its growth efforts on Northwest Europe, and the partnership allowed for a smooth adjustment. We were able to do that knowing that Temenos could flex with us and so minimize any disruption."

Marnix Tummers,
IT Director of Wealth Management
ABN AMRO

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About Temenos

Temenos (SIX: TEMN) is a global leader in banking technology. Through our market-leading core banking suite and bestin-class modular solutions, we are modernizing the banking industry. Banks of all sizes utilize our adaptable technology – deployed on-premises, in the cloud, or as SaaS – to deliver next-generation services and AI-enhanced experiences that elevate banking for their customers. Our mission is to create a world where people can live their best financial lives.

For more information, visit www.temenos.com

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