

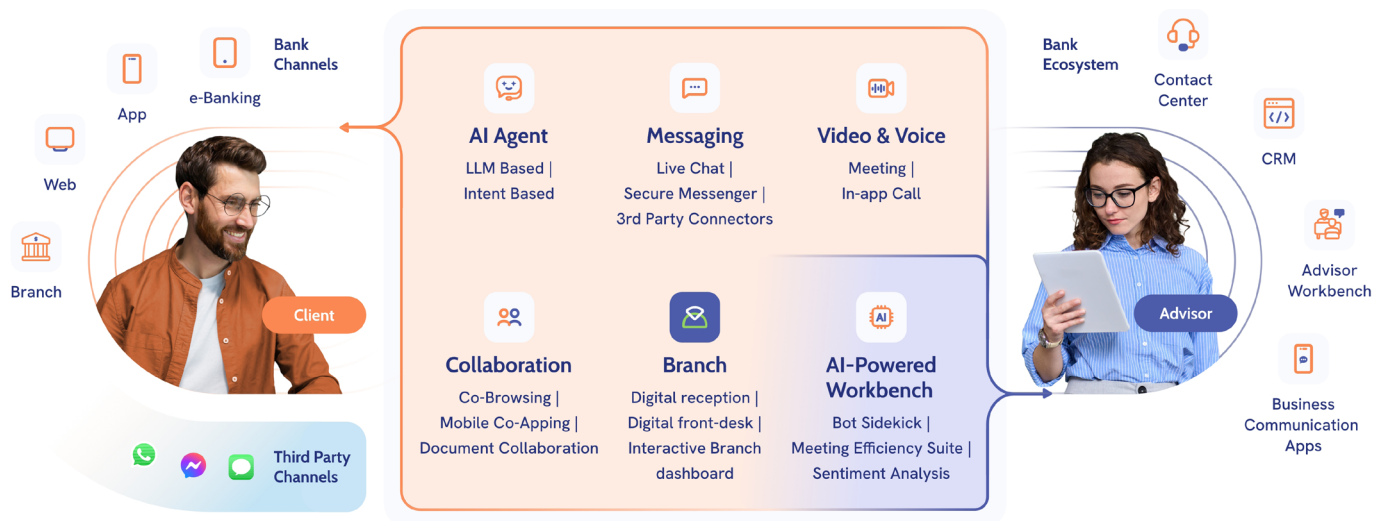


# Wealth Management & Private Banking

Enhancing the Digital Advisory Journey



## Our platform



- High-tech **digital interaction technology** for the financial industry
- Offices in Basel, New York, Toronto, London, Frankfurt, Barcelona and Sofia
- Founded in Switzerland in 2008
- Certifications include: SOC 2 Type I & II & ISO27001
- 170+ customers in the financial industry worldwide
- Part of the Swiss Post Group since November 2022



## 01

# Transform the client journey

Today's clients expect advisory relationships that feel personal, effortless, and ongoing – across every digital channel.

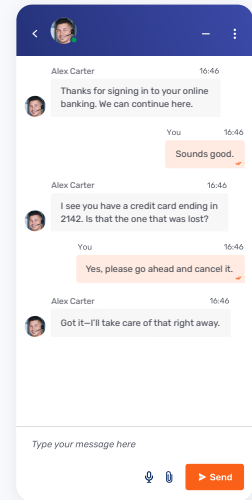
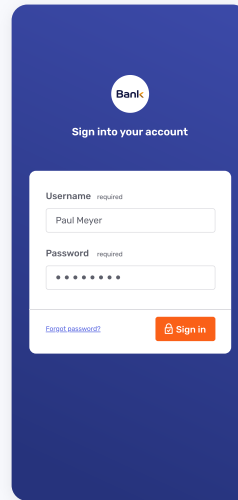
Unblu transforms fragmented interactions into a **single, high-touch journey** where trust, convenience, and human connection coexist seamlessly.

# Transforming the client journey

## 01 Engage Digitally

Email and informal channels are impersonal or risky. Unblu enables connection **within the bank's portal or app**, combining convenience with trust.

- **Asynchronous secure messaging**  
with push notifications ensures clients can engage anytime, anywhere.
- **Deputy and assistant management**  
maintains continuity when the primary advisor is unavailable.
- **Document exchange**  
No more emails. Share or receive files within secure and traceable chat threads.
- **Behind authentication**  
Every interaction takes place after client login to ensure identity verification and access control.



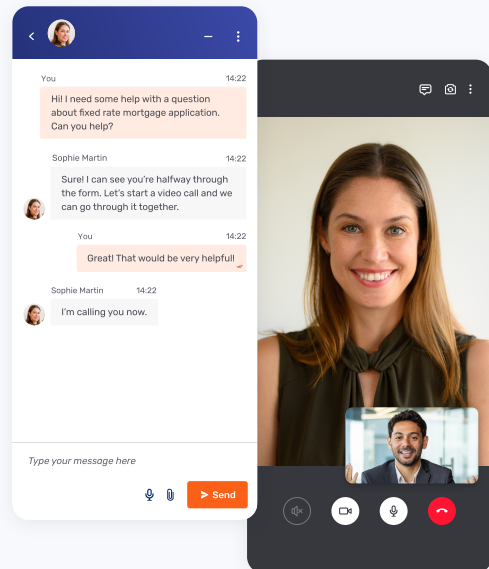
### Customer experience

Clients are reassured their data and conversations are protected, while enjoying instant, personal access that strengthens trust.

## 02 Deepen the Conversation

Advisory is built on personal relationships. Unblu unites **chat, voice, and video in one secure space** to keep conversations human and contextual.

- **Instant chat-to-call transitions**  
Move from messaging to Video & Voice with one tap.
- **In-app calling**  
Native calling experience inside the banking app, complete with familiar notifications for ease of use.
- **Live translation and captions**  
Provide access to advice across diverse client bases.
- **Multi-party video conferencing**  
Bring specialists or family members into the discussion as needed.
- **Flexible recording options**  
Remain compliant with full records.



### Customer experience

Clients feel genuinely heard through richer, timely conversations that deliver a seamless and convenient experience.

## 03 Collaborate on Planning & Decisions

Emails and call-backs constrain collaboration. Unblu unites clients, advisors, and specialists in **real time to review, discuss, and sign** with clarity and confidence.

### → Co-Browsing

Advisors guide clients through online portal such as portfolio dashboards and onboarding forms.

### → Mobile Co-Apping

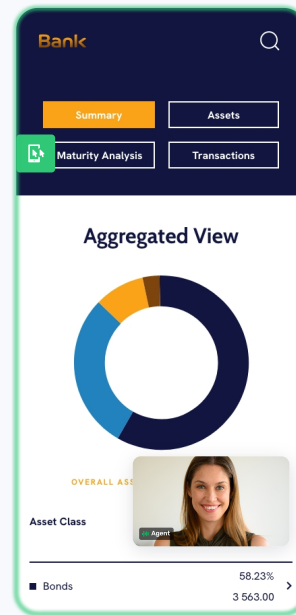
Enable visual collaboration directly within mobile apps.

### → Document Collaboration

Built-in capabilities to review, annotate, and e-sign documents together.

### → Whiteboarding

Illustrate investment scenarios for greater clarity.



### Customer experience

Clients feel guided and empowered as complex discussions become seamless and transparent - and are resolved more efficiently.

## 04 Proactive Engagement

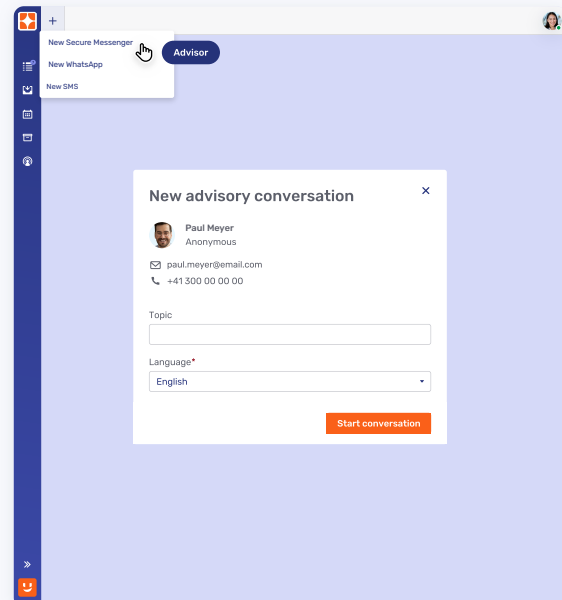
Reactive communication weakens relationships in a world where clients expect immediacy and personalization. Unblu enables advisors to **reach out with timely insights and tailored updates** that nurture long-term loyalty.

### → Outbound Messaging

enables advisors to share tailored research, market insights, and portfolio updates.

### → Breakout Conversations

Create topic-specific threads that involve relevant participants (assistants, compliance officers, or family members) while maintaining privacy and structure.



### Customer experience

Clients feel valued and informed through proactive, personalized outreach that builds trust and continuity beyond meetings.

# 02

## Elevate the advisor experience

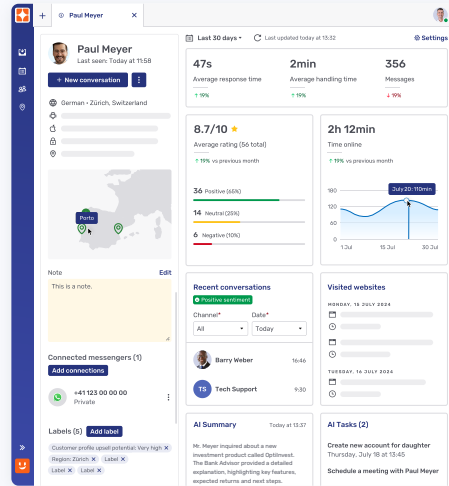
Fragmented tools and manual admin tasks impact productivity, reducing advisor satisfaction and client engagement, while risking churn.

Unblu unites the interaction experience in one intelligent workspace. Advisors gain time, clarity, and focus to deliver truly high-touch, relationship-driven service.

## Manage all client interactions from a centralized platform

### Unblu Advisor Workbench

Fragmented tools waste valuable time. Unblu's Advisor Workbench is an AI-powered hub for all client interactions that empowers advisors to work smarter and faster.



#### → 360° client dashboard

Prepare for client meetings with a comprehensive dashboard that enables tailored, high-value engagements.

#### → Seamless back-office collaboration

Hidden/visible participants, such as assistants or product specialists, can join client conversations in real time, enabling instant support and increased efficiency.

#### → AI-powered assistance

Automate summaries, task tracking, and meeting notes.

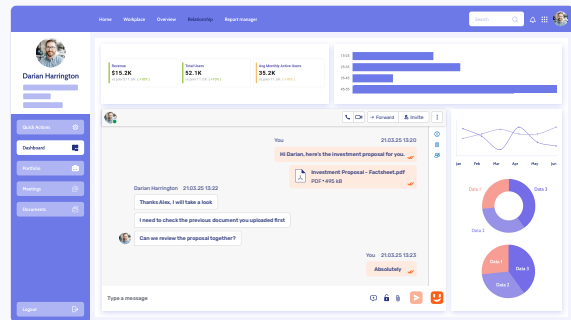
#### → Bot Sidekick

A Gen AI personal assistant to deliver precise, context-aware suggestions. Receive instant assistance that draws from your existing knowledge base.

## Seamless ecosystem integration

### Pre-built connectors and flexible integration options

Maintain workflow continuity with an advisor-first platform. Unblu integrates directly with leading CRMs, advisor workspaces, and portfolio management systems.



#### → One interface, all functions

Advisors access chat threads, documents, call histories, and client profiles within a single, unified interface.

#### → Real-time notifications

Advisors are alerted to client messages, updates, or replies in real time - keeping them responsive and reducing delays.

#### → Context-rich conversations

Each message is tied to the client's record, preserving full advisory context across interactions and maintaining service continuity.

#### → Improved adoption

Advisors prefer tools that align with how they already work. Embedding Unblu within existing systems drives faster uptake and user satisfaction.

