Indigita

Efficience
DESIGNED AND DEVELOPED BY THE KEY

News release

Indigita and The Key partner in helping external asset managers and family offices navigate financial regulations

Geneva, 23 March 2021 - **Swiss regtech company Indigita SA and Swiss portfolio management system (PMS) software provider The Key SA have announced their collaboration to bring automated cross-border controls to independent asset managers and family offices in a fully integrated solution.**

By joining forces, The Key and Indigita are offering financial intermediaries a complete and fully integrated solution to mitigate cross-border risks that may occur as part of daily business activities and client interactions. As part of the collaboration, Indigita will bring the unrivalled regulatory knowledge of BRP Bizzozero & Partners SA and BRP Tax SA to The Key's "Efficience" PMS platform. This forms the basis for automated cross-border checks and controls along the business processes of independent asset managers and family offices to help them operate safely in today's highly complex regulatory environment.

The regulatory knowhow supplied by Indigita is combined with automatic data feeds from more than sixty custodian banks, risk management functionalities answering new regulations, AML and PEP checks based on Polixis data, stock analysis and reports supplied by investment research firm theScreener and an integration with Canon's "Therefore" solution for documents management. Overall, it makes Efficience PMS a unique and fully integrated tool for financial intermediaries to handle their portfolio management, client relationship management and back office operations in a compliant and cost-effective manner.

Thanks to its modular approach, Efficience PMS is highly flexible in terms of functionality as well as pricing and can easily be tailored to specific client needs. The platform can be accessed on desktop computers, laptops and via dedicated app on mobile devices running iOS.

The Key founder and director Bruno Fiévet said: "We are pleased to welcome Indigita as a new partner. Indeed, Indigita brings complementary functionalities to our PMS Efficience. With the integration of their API in Efficience, our users will access a powerful tool and will be able to generate automated cross-border controls. This new partnership contributes to achieve our goal to provide an all-in-one platform to independent wealth managers and family offices."

Indigita CEO Achille Deodato said: "We're thrilled to partner with The Key to combine our unrivalled regulatory knowledge with their leading portfolio management solution. For Indigita, this collaboration represents another step in integrating our services with established platforms and extending our position as an industry standard for the seamless digital delivery of cross-border information for external asset managers and family offices."

Indigita's automated cross-border controls are available as a component of The Key's Efficience PMS upon request as of now.

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About Indigita SA

Indigita SA is a Swiss regulatory technology (regtech) company headquartered in Geneva, which provides a suite of interactive trainings, digital tools and APIs to support financial institutions and their employees to conduct cross-border business in a safe and compliant way. Indigita is the regtech arm of the BRP Group and combines the industry-leading regulatory knowledge of its mother company BRP Bizzozero & Partners SA and its sister company BRP Tax SA with innovative digital channels. Indigita provides banks and asset managers efficient access to the most complete and up-to-date collection of cross-border rules for more than 185 countries.

www.indigita.ch

About The Key SA

The Key SA, created in 2014, is a company dedicated to independent Wealth Managers and Family Offices. With his experience in the field of finance and his IT training, Bruno Fiévet – founder and director of The Key SA – developed the software Efficience.

www.thekey.tech

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