

News release

Indigita and Prometeia Enhance Financial Advisory Workflows with Cross-border Expertise

Geneva, 18 February 2025 – **Swiss regtech leader Indigita SA and global wealth management platform provider Prometeia have joined forces to introduce an integrated solution designed to further streamline financial advisory workflows. This joint-solution empowers relationship managers to create investment recommendations that seamlessly account for cross-border risks, product placement requirements, and tax suitability in addition to client preferences, sustainability and FinSA investor protection requirements.**

As the financial industry faces increasingly complex international regulatory landscapes, the need for robust compliance solutions has never been more critical. The integration of Indigita's cross-border expertise into the Prometeia Digital Wealth Management Platform strengthens its ability to streamline investment advisory by embedding checks and assessments of cross-border services, product placement, and tax suitability directly within the advisory workflow. This partnership removes manual inefficiencies, enabling financial advisors to navigate complex regulations effortlessly while delivering tailored, compliant, and optimized advisory services. The combined solution powers complete advisory workflows, equipping financial institutions with automated pre-trade checks, personalized investment proposal validation, dynamic portfolio oversight, risk management and seamless documentation and reporting. These enhancements allow institutions to construct and manage investment proposals with greater efficiency, accuracy, and regulatory confidence across multiple jurisdictions.

*Wealth management is evolving rapidly, facing increasing regulatory complexity, operational inefficiencies, and growing client expectations for personalized, data-driven service" said **Carmine Cammarota, Country Head of Prometeia Switzerland.***

"With this integration, we reinforce our commitment to equipping financial advisors with intelligent solutions that enhance advisory efficiency, ensure compliance, and enable truly global investment services."

Nabil Hatimy, Director and Head of Partnerships & Client Delivery at Indigita: *"Our collaboration with Prometeia marks a significant step forward in addressing the evolving challenges of cross-border portfolio management. By integrating regulatory intelligence with advanced portfolio analytics, we provide financial institutions with a powerful tool to drive compliance and efficiency in their advisory services."*

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 190 jurisdictions.

www.indigita.ch



Schedule a meeting

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About Prometeia

Prometeia is a global provider in software and data solutions for the financial sector. Founded in 1974 as a non-profit economic research institute, its rigorous, client focused approach to wealth, asset and risk management has made it a trusted partner of more than 500 institutions across 20 countries. Prometeia's flagship front office Digital Wealth Management Platform transforms the way private banks interact with their clients by enabling sophisticated, personalized, value adding omni-channel services at scale. Automating routine tasks leads to a lower cost-to-serve, while deep regulatory expertise ensures compliance with MiFID II and FIDLEG. Our Data & Analytics Services (DAS) empower financial institutions with proprietary data analytics, seamless integration, and AI-driven insights—offering a unique competitive edge in investment decision-making, risk assessment, and regulatory compliance.

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