Indigita

new access

INDIGITA & NEW ACCESS INTEGRATE AUTOMATIC CROSS-BORDER CONTROLS

Peace of mind regarding product suitability and cross-border regulations, built right into your core banking system.

Indigita and New Access offer an integrated solution, combining the Indigita API with the New Access Wealth Management Core Banking System, Portfolio Management System (PMS) and Digital Client Lifecycle Management (CLM) application. This allows financial institutions to automate their cross-border, product suitability, investor protection and tax suitability controls, based on the unrivalled country manuals of BRP Bizzozero & Partners SA and BRP Tax SA.

The integrated solution can be applied to the various modules of the New Access solution suite and its rule engine functions with standard and customised country manuals.

INDIGITA SA

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EXAMPLES OF USE CASES

PRACTICAL USE CASES	SERVICES	PRODUCT PLACEMENT	TAX SUITABILITY
Onboarding	■		
KYC Review	■		
Meeting management	■	■	■
Travelling management	■		
Marketing doc. related to financial product and send automatically to client	■	■	■
Product suitability 360 degrees	■	■	■
Advisory service and investment proposal	■	■	■
Order processing	■	■	■
Tax rating at the product value file level			■
Offboarding	■		