



VISUALIZING RISKS.

UNRISKOMEGA^{WEALTH}

THE INNOVATIVE ADVISORY SOLUTION FOR A RISK AND REGULATORY COMPLIANT WEALTH MANAGEMENT.



www.unriskomega.com
sales@unriskomega.com

Challenges for Banks and Independent Asset Managers (IAM)

Regulation: Regulatory frameworks such as FID-LEG and MiFID II require a transparent wealth advisory, considering the knowledge and experience, the investment objective and the risk profile of the client. Additionally, the regulation imposes extended information, documentation and monitoring duties on financial institutions.

Cost-efficiency: Margin retention can only be reached with cost efficiency. This requires an automatization of cost sensitive advisory processes like risk monitoring and compliance (e.g. client suitability and documentation).

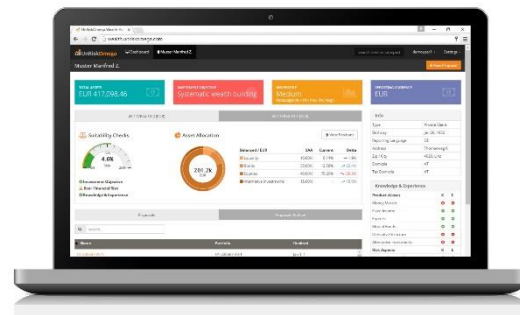
Client expectations: Clients expect a high-quality wealth advisory and a performance appropriate to their risk profile. This can only be achieved with the required transparency and attention to detail as well as by active involvement of clients in the advisory process.

Our Solution

Designed as a working tool for the client advisor, UnRiskOmega^{Wealth} supports the advisory process with a wide range of analysis, monitoring and advisory functionalities. With this solution, client advisors are able to use their time more efficiently for the client service.

The basis of UnRiskOmega^{Wealth} is a powerful risk engine for the calculation of all risk indicators on portfolio and instrument level relevant for comprehensive risk and return analyses of investment portfolios. Combined with the basic rule set for suitability and appropriateness tests of the integrated rule engine, UnRiskOmega^{Wealth} provides automated processes for a risk and regulatory compliant wealth advisory as required by FinSA and MiFID II.

In order to meet the increased client expectations for a modern and high-quality wealth advisory, UnRiskOmega^{Wealth} can also be used on mobile devices, which offers new possibilities for client meetings. This enables client advisors to explain to clients the complex world of investment products in a comprehensible manner, which increases their confidence and therefore creates a solid basis for a long-lasting and successful client relationship.



UnRiskOmega^{Wealth} – the Convincing Benefits

	Risk Assessment	Compliance	Portfolio Allocation	Investment Proposal
Client	Clients can rely on the fact that the risks of their investments are constantly monitored.	Clients receive advice that takes their knowledge level, investment objective and risk profile into consideration.	Clients can be involved in the advisory process and therefore are able to understand the impact of portfolio reallocations.	Clients receive a comprehensible investment proposal answering their crucial questions regarding investments.
Client Advisor	Pre-trade and post-trade risk assessment allow a proactive action of the client advisor.	The automated monitoring of regulations like suitability and appropriateness leaves more time for relationship management.	Thanks to the real time calculation of reallocations, client advisors are able to discuss the impact directly in client meetings.	Efficient and structured processes support the client advisor in generating risk and regulatory compliant investment proposals.
Bank / IAM	With automated risk assessments, banks and IAMs will save time and increase the advisory quality.	Thanks to constant monitoring of regulations, banks and IAMs are able to reduce liability risks.	By using innovative solutions in direct client contact, banks and IAMs will generate a unique client experience.	Comprehensive and transparent investment proposals increase trust and lead to long-lasting relationships.

Interested in a live demonstration?

Simply contact us today.

UnRiskOmega AG
Weierstrasse 10
CH-8302 Kloten

+41 44 800 30 30
sales@unriskomega.com
www.unriskomega.com

UnRiskOmega Team:



MathConsult GmbH
www.mathconsult.co.at



multilateral AG
www.multilateral.ch

uni software plus

uni software plus GmbH
www.unisoftwareplus.com