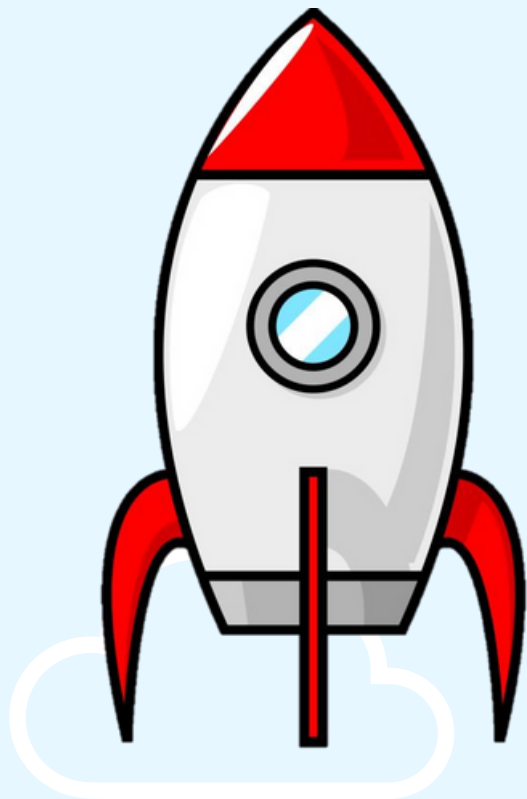


# Fundvisory

Digital savings solutions



# Fundvisory Solution as a Service



## **Business**

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*Certified financial advisor and  
savings broker*

## **Software**

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*Our bricks, our achievements and our  
integration*

## **Architecture**

---

*Data processing, security and  
production*



# Multi-channel integration

We are able to process any input and return both calculations, interfaces and files in any form. Our platforms include:

- I/O file processing
- API
- API and customized iframes
- Dedicated websites
- Hybrid solution





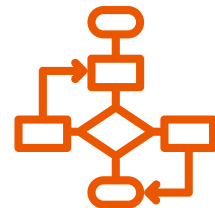
## Our bricks

We deploy business bricks adapted to the client's needs and use case.

Risk analysis, savings diagnosis, client and project (re)profiling, personalized (re)allocation, savings coach, Fourgous tool and compliance alert systems. These are in constant evolution.



Diagnosis



Profiling



Allocation



Reporting



Publishing



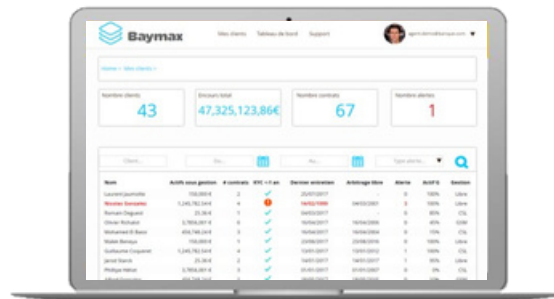
Alerting DDC

# Interactive platform

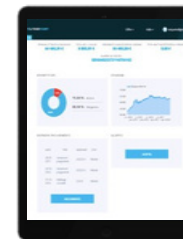
In an unprecedented context of distance between all the actors of the economy, piloting the commercial and regulatory activity of one's company in telecommuting, assisting one's client in all interactivity and managing your savings in self-care are musts.



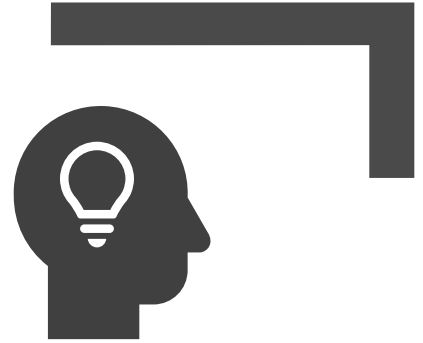
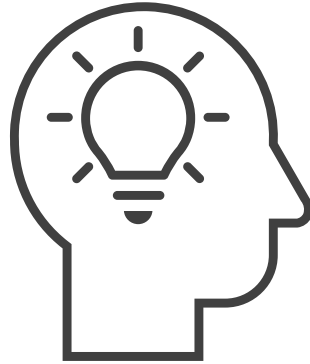
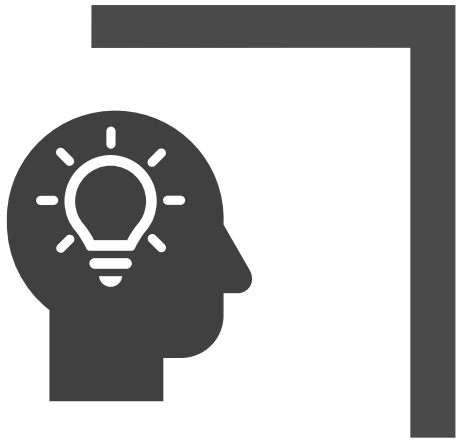
**Administrator console**



**Advisory platform**



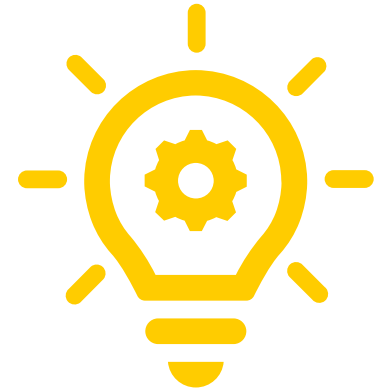
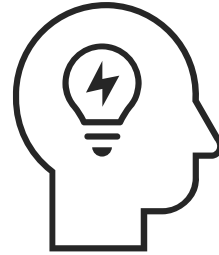
**Customer interface**

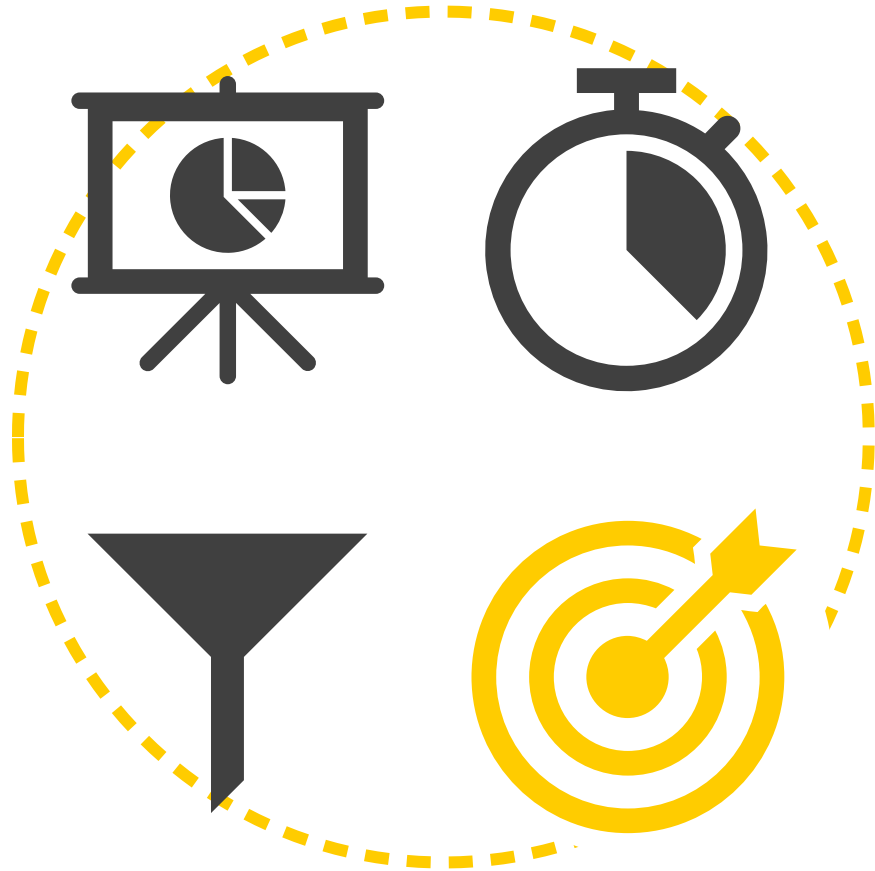


# FundvisoryStudio

Fundvisory Studio is an intrapreneurship coaching service that allows you to imagine and express your needs in a hyper-agile framework.

Budget your project and create a convincing presentation to the board.





# Fundvisory Studio

## Step 1 conception

During three time-limited workshops:

We put at your disposal productowner, analysts and designers.

You express your needs in warroom, prioritize your functionalities and formulate the key steps of the project.

# Fundvisory Studio

## Step 2 delivery

Two weeks later,  
you receive the comex package:

- Expression of needs and target cinematic expression
- Project Business Canvas
- Subdivision and planning
- Macro-budget

