



# ACCLAIM

RECOGNISING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY  
THROUGH THE **WEALTHBRIEFING** AWARDS PROGRAMME

**EXCLUSIVE**  
WINNERS OF THE 2020  
WEALTHBRIEFING  
EUROPEAN AWARDS



November 2020

# FINANTIX GETS INSPIRED BY ITS CLIENTS TO BUILD A WORLD-CLASS BUSINESS

**Christine Ciriani**, Chief Executive Officer and Chief Commercial Officer, Finantix, talks to **Tom Burroughes** from *WealthBriefing* about the journey this firm has been on as it marks another award result.

## What sets you apart from your peers this year?

In a nutshell, accelerated delivery! We have implemented global projects on-time, on-budget in consistently challenging situations while continuing to evolve our product through ongoing and consistent investment in R & D to drive innovation

## How have your colleagues contributed to the success of your organisation?

- Client-first attitude
- True global teamwork
- Reliability and dependability

## What will you do to keep to the standard of an award-winner and push ahead in the future?

Continue to work closely with our clients and market analysts to evolve the Finantix product offering, to stay ahead of the curve, remain relevant, and acquire talent and product know-how through organic and inorganic growth without ever compromising our singular focus on product quality and culture.

## What have the challenges been in obtaining excellence?

Finantix enables all key actors from clients to front-office to mid-office and compliance in supporting the delivery of insightful, compliant and digitalised sales and advice. Our value proposition can be adopted with enterprise-ready integrated comprehensive solutions or point-solutions. This message can be a complex one to communicate!

We are also growing and want to grow sustainably with a focus on our culture of quality,

innovation, respect and reliability - so with growth come growing pains, as you might expect! Our growth needs to be carefully and consistently managed so we retain our DNA, and our focus on innovation and delivery excellence.

## Whom do you look up to for inspiration and examples to emulate and compare yourself against, either inside or outside the wealth management industry?

There are many examples of inspiration around us. Following Finantix's participation in Davos this year, which showed how trust and fintech go hand-in-hand, for us we find inspiration in our clients who are continuing to pave the way in re-defining themselves and are electing to service their clients in a differentiated manner.

This includes Tier One banks, who continue to evolve the products they offer across their client segments, to smaller niche players who are using digital to differentiate and attract NextGen customers through personalised service and a focus on holistic wealth management.

We also gain inspiration from working with associations on machine learning and ESG, as we look at how we can use AI to improve delivering ESG products to clients effectively, and through non-financial technology firms on how they improve workplace automation and how we would apply that to RM efficiency.

## What do you hope will be the main consequence of achieving this accolade?

That our team continues to feel proud of the company they work for – an accolade like this rewards their hard work and efforts.

Second, that our clients and prospects feel they are working with a firm recognised by such a prestigious group with a strong reputation in the industry segments we work in.

## How will you use the award to raise your profile in the industry and among clients?

Share the good news! We will definitely use our refreshed marketing to share the news of the award win internally with our staff who will all have contributed in some way to our award win and making it possible; and externally, using a variety of communications channels to reach our clients, prospects, alliance and delivery partners and alumni! ■

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