invsta

powering better financial experiences

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our story

Invsta is a fintech driven company, providing intelligent digital engagement and innovative solutions to financial service businesses globally, helping them to benefit from, and stay relevant in today's digital world.

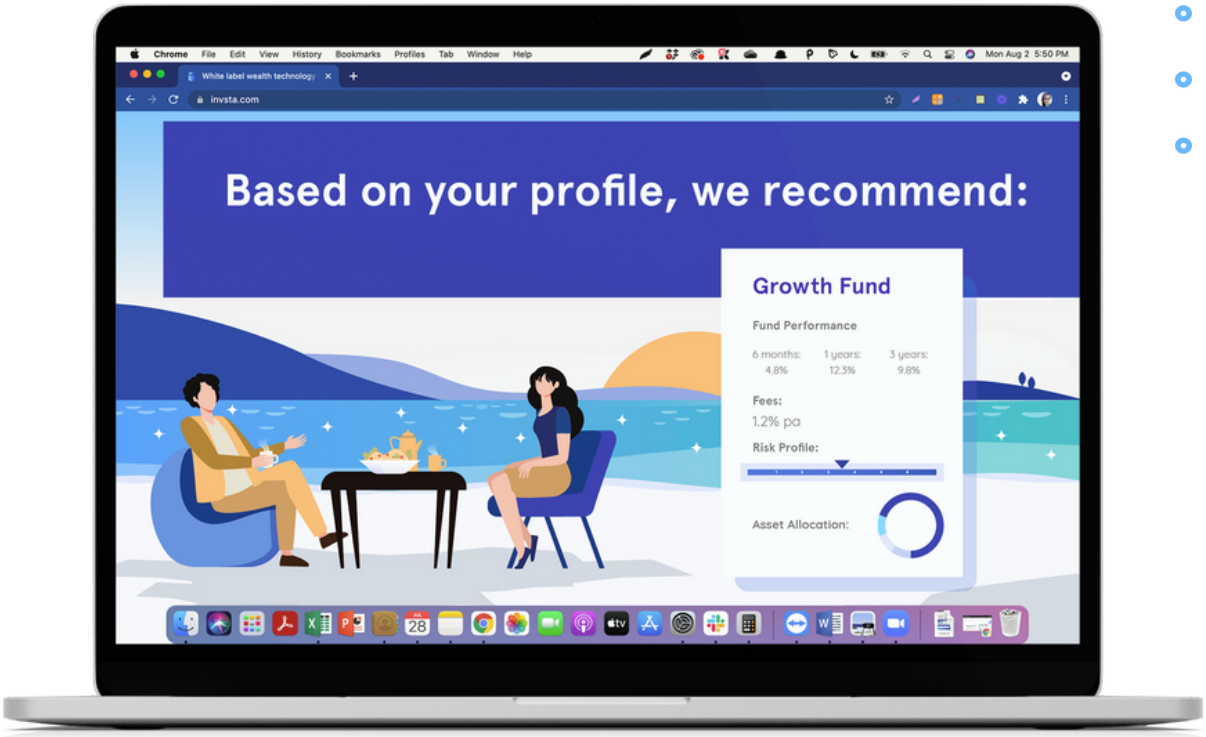
We're an award-winning B2B company, providing a range of white-label modules and interface solutions for financial service providers. Our solutions are focused on 3 core areas: providing an interactive and engaging online client experience, improving back-office efficiencies and streamlining compliance. With a clear vision to empower the future of financial services through digital innovation and engagement, we are committed to ensuring the financial services industry thrives in the face of digital disruption.

“Digital empowerment” is at our very core, it's what we live and breathe. We are passionate about harnessing the power of technology to help you achieve your business goals. We work with you to find an accessible, future-focused solution that addresses your specific business needs and to provide better financial outcomes to you and your customers.

Our mission is to create seamless, intelligent and beautiful digital engagement solutions that your clients will love, while empowering your employees through improved business efficiencies and digital processes.

"We are driven to develop and bring digital solutions to the market that increase accessibility and enable better outcomes for financial service providers and their customers."

- Rachel Strevens, Founder & CEO

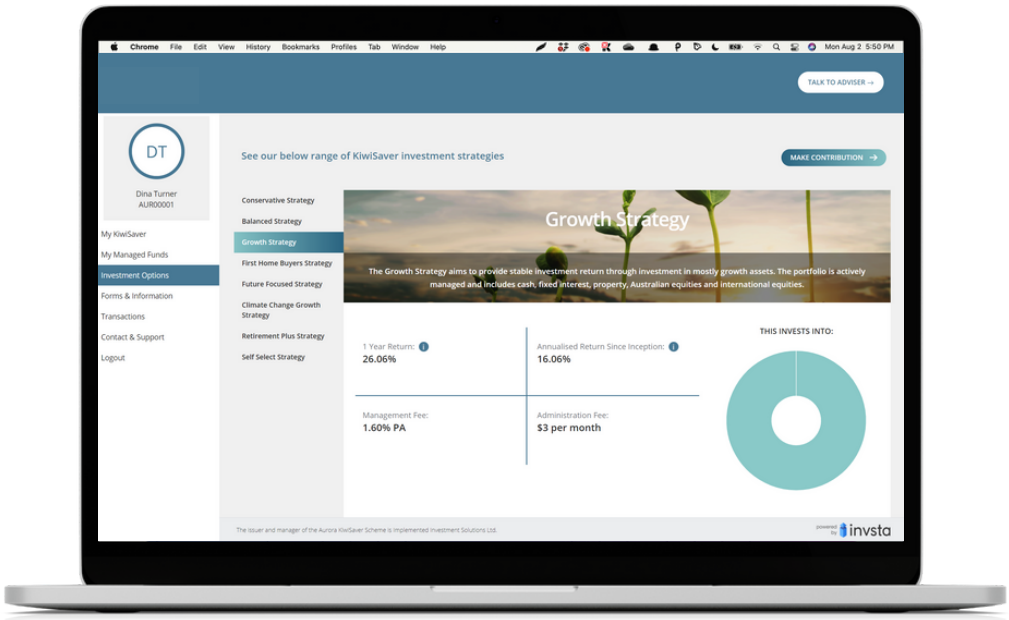


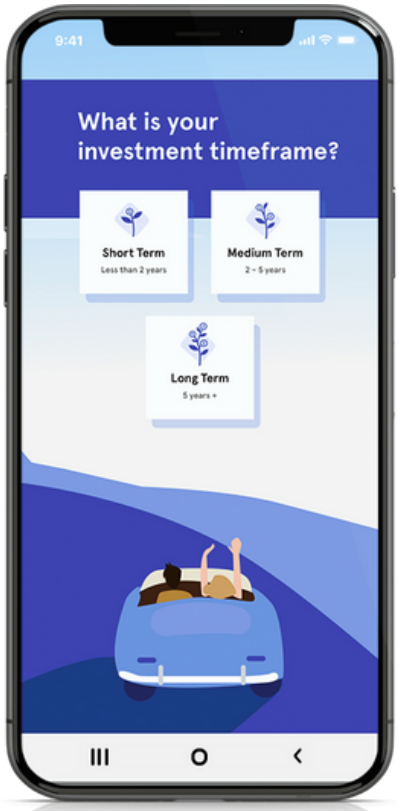
intuitive white-label solutions

We've developed our white-label solutions with flexibility in mind, giving you the control to customise your digital user interface and experience.

Our solutions have been built out, improved, and refined over many years, meaning you get the benefit of years worth of learning and experience. Our modules are ready to be customized to fit your business requirements, and we simply take your workflows, business process, design, and branding elements to configure a solution that is right for you.

We exclusively develop and provide technology for the financial services industry, and with this laser focus, we have become the experts when it comes to front end technology for the sector. Our suite of fintech solutions are constantly evolving to meet industry and market demands, and we spend a significant amount of time and money on new product R&D, to ensure that we are the innovation partner of choice.





digital solutions for financial service providers

With the rapid pace of technological advancements in the financial services industry, firms need to partner with a digital provider who can help them to leverage efficiencies, boost client engagement and satisfy compliance requirements. It's an incredibly exciting time for companies to reinvent themselves in the wake of the digital revolution. The explosion of technology presents a massive opportunity to tap into new segments and address the financial needs of a much wider audience, opening up new opportunities to grow FUM and market share like never before.

solutions for wealth advisors

An intelligent investment and customer management solution that fosters and supports an enduring client-advisor relationship through digital engagement tools.

Enhance and support the client-advisor relationship by engaging with current and future clients digitally. Our solution helps you to create a truly engaging and immersive online experience that enables you to develop deeper and more meaningful customer relationships through intuitive digital tools.

Empower advisors to deliver an elevated service experience by streamlining customer management and simplifying advice processes:

1. Reduce administration costs and speed up the onboarding time through eKYC and eAML functionality, which automatically captures and verifies key customer information in a matter of seconds.

2. Strengthen your business' advice model by providing your investors with a suite of complementary self-service tools that encourages client ownership and reduces your administration burden.

3. Make the sign-up process a pleasure through a slick and effortless digital onboarding experience. Interactive client dashboards provide visual investment tracking tools and relevant performance information

1 A slick and intuitive digital onboarding experience gives investors a great first impression, while enhanced usability makes it easier for people to directly invest into your funds anytime.

2 Effectively grow and manage your customer base through client self-service functionality and automation. Easily inform customers about fund updates and market information through interactive and tailored client communication tools.

3 Information is automatically captured, verified and updated through eKYC and eAML functionality. Automated alerts and data transparency empower teams to meet changing regulatory requirements.

solutions for fund managers

An integrated investment and customer management platform to improve customer engagement and support your business growth journey.

Empower your customers, simplify the investment process and drive a customer- centric and agile fund management business. Get the tools to thrive in the new digital age. Our solution provides a truly immersive digital investment experience that allows you to effectively capture new market segments and grow funds under management.

Delight and excite customers through mobile responsive digital engagement tools by giving them the flexibility and transparency they demand.

solutions for KiwiSaver providers

An intuitive investment and customer management platform that makes it easier to attract and retain the next generation of investors.

Provide a captivating digital experience to effectively service a growing client base, while building a sustainable and intuitive business that delivers engaging information to help customers achieve their investment goals. Our solution helps to foster long-term relationships with customers by empowering them to digitally interact with their investments.

Give clients a mobile-first investment experience that enables them to interact with and plan their retirement goals.

1 Interactive client dashboards and online investment makes it easier for clients to add lump sums into their KiwiSaver account. Digital advice can support your clients throughout their investment journey.

2 Easily attract new market segments through digital onboarding and automated AML and KYC functionality. Powerful data analytics tools provides clear insight into customer trends and needs, opening up opportunities to improve customer engagement.

3 Setup standardised workflows and automated digital processes, such as eKYC and eAML in the online onboarding process, to support, enhance and streamline compliance for a large customer base.

1 Make a great first impression with a sleek and intelligent digital onboarding experience that is customised to match your brand's image and process workflows.

2 Improved efficiencies, automated workflows and visibility over the sales cycle reduces administrative time and cost overheads.

3 Electronic verification provides real time confirmation of AML information. Validate, capture and store client information - all in a matter of seconds.

digital onboarding solution

An integrated customer onboarding solution that scales with your business as you grow by opening up channels to market and improving customer engagement.

Enhance the client experience and improve accessibility during that all-important first interaction. Simplify the sign-up process by integrating eKYC and eAML into a seamless and intelligent digital onboarding form.

Our solution is designed to cater to multiple account types, and can be customised to your brand. From quick and simple individual account opening, through to complex, multi-level ownership structures and wholesale investor documentation, forms can be adapted to incorporate company-specific workflows.

robo advice solution

Developed with flexibility in mind, our white label robo advice platform can be customised to match your branding requirements and include your specific workflows and advice protocols.

Intelligent algorithms based on client's risk profiles and other data points help to deliver curated advice to each investor. Intuitive workflows keep customers engaged and educated throughout their journey, helping to improve the financial literacy of investors.

Accelerate your direct-to-retail strategy by combining lower management fees and smaller account minimums with automated digital advice to improve the investing strategies for the next generation of investors.

1

Scale your advice process to effectively capture and service new markets in a cost-effective and interactive way.

2

Whether you choose to go hybrid or fully digital, a robo advice platform helps to improve accessibility to a larger audience, and makes it more feasible to service them anytime, anywhere.

3

Advice can be delivered in real-time, with optional statement of advice documents available for download. Advice disclosures, earnings and information can be graphically displayed, educating investors through integrated buttons and chat functionality.

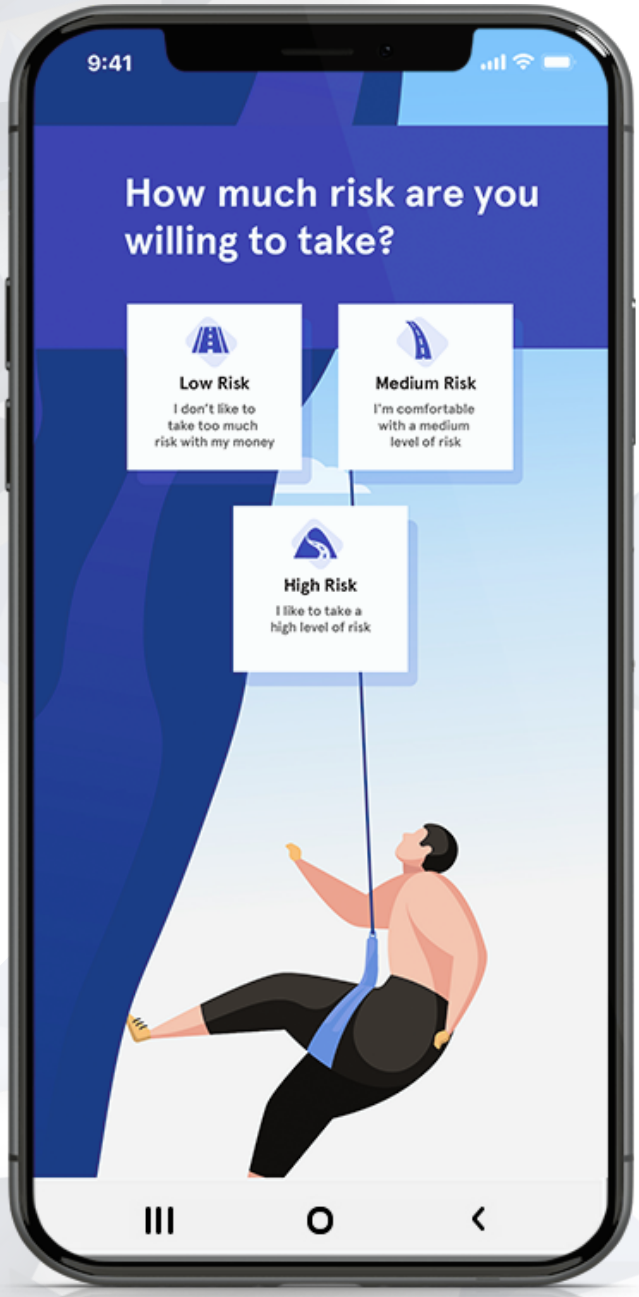
modules

Designed and tested with the end user in mind, our range of mobile-responsive digital tools and modules help support your unique business goals. Our modules are designed to complement each other and work together to provide efficiencies and enhancements to your current processes and workflows.

Our modules are focused around 3 core areas:

- Improving back-office efficiencies
- Improving digital client experience
- Streamlining compliance management

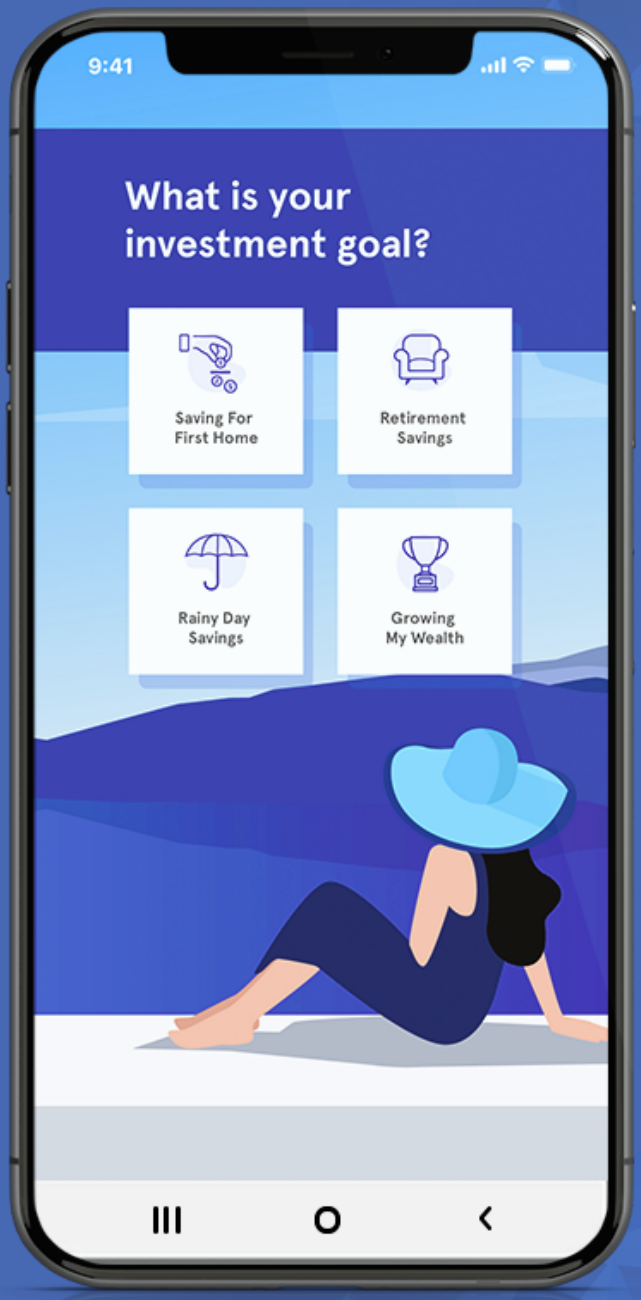
modules for digital engagement



- Customer Portal & Investor Dashboard
- Online Investment
- Investment & Performance Tracking
- Mobile App
- Financial Calculators
- Risk Profiles

modules for business efficiencies

- eKYC & eAML
- OCR (Optical Character Recognition)
- Biometrics
- Advisor Portal
- Admin & Compliance Portal
- User Analytics
- CRM



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Embrace the opportunities of a digital age and start future-proofing your business, today.

We offer a complete end-to-end digital customer management solution, which is backed by industry experience and developed to address the needs and concerns that are specific to financial service providers. Book a demo to see our solution in action.

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