



## Press Release

# New Access completes rollout of its front-office solution suite at EFG International

Geneva, Switzerland – March 26<sup>th</sup>, 2018

**New Access, the leading private banking software provider, announces that Swiss private bank EFG International (EFG) has recently successfully completed the migration of all former BSI businesses onto EFG's single IT platform and its front-office suite.**

The solution suite includes New Access' comprehensive Customer Relationship Management (CRM) solution together with the full Onboarding processes management tool. New Access thereby provides EFG with a front-end solution suite, which not only meets the bank's technical needs but is also fully compliant with all latest regulatory requirements. In addition, EFG is also a long-term user of New Access' electronic document management system: LOGICAL ACCESS®.

"We have completed the migration of all existing front-end tools onto EFG's single IT platform before 2017 year-end thanks to effective collaboration and team spirit with New Access being an experienced and trusted partner. Operating on a combined platform with New Access' front-end solutions, we now aim to further drive our digital strategy forward to ensure an even smoother and more efficient communication with our clients," stated Mark Bagnall, Chief Technology Officer of EFG International.

"EFG International has been a key customer since many years, we are proud to have been part of such a crucial and significant project. The success of this migration is the result of a common vision and joint effort of our teams. Our front-office solution suite supports the bank in achieving mandatory regulatory compliance across the organization and is part of EFG's Digital strategy going forward," explains Vitus Rotzer, CEO of New Access.

### About New Access

New Access provides agile and scalable front-to-back software solutions designed to meet the specific requirements of the private banking and wealth management industries. Evolving in a complex and changing regulatory environment New Access' solutions help bankers to connect conveniently and efficiently with their clients thanks to new digital channels.

Our offer covers the full client relationship lifecycle from account opening, through client data and document management to the management of their portfolios:

Onboarding and Client Relationship Management (CRM), secure Electronic Document Management System (EDMS) with LOGICAL ACCESS®, Portfolio and Order Management (PMS/OMS) with EQUALIZER®, Client Data Management with CIM and a comprehensive Core Banking solution with APSYS.

New Access' Front-End solution BANKER'S FRONT integrates in one 360° view all information linked to the client including: onboarding processes, documents, portfolios, and client data.

New Access provides professional and personalized Managed Services, which involves operating or running IT systems as well as application management services for its clients.

With headquarters in Geneva, New Access already installed its solutions in over 180 sites in 19 countries.

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