

Banking CIO Outlook

New Access

TOP
**WEALTH
 MANAGEMENT
 TECHNOLOGY**
 SOLUTION PROVIDERS
 2021

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*The annual listing of 10 companies that are at the forefront of providing
 Wealth Management Tech solutions and impacting the marketplace*

New Access Digitalization of Banking Services Simplified

One of the few positive takeaways from the COVID-19 pandemic is the push for digitalization of the financial services, wealth management, and banking functions for the smooth and efficient orchestration of customer-facing services in the fintech arena. But, digitalization is easier said than done, especially in an industry that is bound by sophisticated regulatory compliance requirements. Business-critical functions such as core banking, client lifecycle management, and portfolio management system are bombarded by technological constraints such as data accessibility, ease of use, and information security. Therefore, a congruence of banking/wealth management expertise and digital transformation skill sets is highly sought-after in the financial arena – a congruence that is reminiscent of New Access, an agile and scalable Core-to-Digital solutions provider, dedicated to private banks and wealth and asset managers.

“
Our competency lies in identifying the most appropriate solution for the challenges faced by the client
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The company epitomizes the phrase ‘one-stop shop’ through its fully modular core-to-digital solutions and managed services, which enable clients to solve any current and future challenges, regardless of the complexity. “By positioning ourselves more as a business partner than just a service provider, we offer all the necessary tools that a bank or wealth manager would require to deliver fruitful, secure, and compliant banking services to customers,” says Vincent Jeunet, the CEO of New Access.

The company can count on its Banker’s Front digital client lifecycle management platform (CLM) to efficiently empower banks, wealth managers, and investments managers to manage a successful digital transformation journey. Through this complete 360° CLM cockpit, banks can now effectively manage onboarding, customer relations, investment proposals, and asset holdings. On another hand, New Access’ offering is also supported by the Equalizer portfolio management system (PMS) that provides easy control and unerring analyzing tools to private

bankers and wealth managers, through which they can drive investment strategies in the best possible manner. New Access completes its core-to-digital offering with a robust and reliable Apsys Core Banking System.

On top of that, the company offers some IT managed services through its own dedicated client services team of international knowledgeable and experienced consultants, allowing banks and wealth managers to focus on their key deliverables, knowing that New Access is effectively handling their back-end IT processes.

Considering the usefulness of New Access’s full-fledged offerings, the costs incurred while running them are quite competitive. Moreover, clients do not necessarily always have to invest heavily on integrating the entire suite, as New Access allows them to choose any of the solutions depending on their needs, be it the core banking, CLM, or other modules relevant to the client.

New Access’s recent collaborations with FinTech entities demonstrate its proficiency in providing state-of-the-art banking services to its clients. With the current challenges faced by the industry, the client requires a reliable partner that could provide solutions that would perfectly match with its specific needs. New Access perfectly understood this component and is continuously refining its strategy of “working with the best to deliver the best”. “Our competency lies in identifying the most appropriate solution for the challenges faced by the client,” says Julien Couronne, the Marketing Project Manager of the company. New Access made the choice to surround itself with high-end partners, covering features as digital signature, risk metrics, cross border compliance, PSD2, and blockchain.

Drawing inspiration from such successful collaborations, the company, to thrive further, has already devised a three-year roadmap to enhance its portfolio of solutions. Bringing innovation in the wealth management software industry through API and web services-based applications are at the core of the Geneva-based company roadmap. Moreover, with the growing need for solutions that can handle the newfound boom in cryptocurrency, New Access is looking to incorporate more advanced e-banking capabilities to its offerings.

Constantly seeking for new technologies and new ways of digitizing and growing its clients’ businesses, New Access will continue to strengthen its foothold in the fintech space and provide the best possible services to its clients. **BC**



Vincent Jeunet