RAISE PARTNER

Private Wealth Management use case

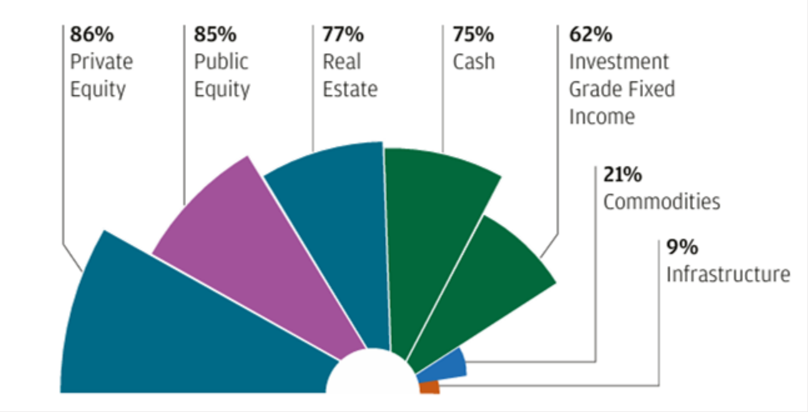
A global wealth approach to asset allocation

Raise Partner launches a new turnkey digital solution Smart Risk Decisions to support private banks and family offices in their asset allocation process.

Challenges for Private Wealth Managers

- **Diversified investments –** Managing multi-asset class portfolios with illiquid or non-listed assets requires deep expertise and advanced tools.
- **Client expectations –** Investors demand more transparency, personalization, and proactive advisory.

Family Offices Favor Alternative Investments
(Source: J.P.Morgan 2024 Global Family Office Report)



Our solution: Smart Risk Decisions for private wealth managers

Smart Risk Decisions helps private wealth managers navigate the increasing complexity of cross asset-class portfolio construction with a robust, intuitive and immediately usable application.

Turnkey digital solution	Access the web app instantly through an easy-to-use interface with built-in market data and no need for complex IT integration
Global wealth modeling	Model portfolios with a wide range of out-of-the-box indices across asset classes to get a global and unified view of the client's wealth
High Value Features	Assess risk, simulate scenarios and optimize allocations across all asset classes in line with the client's goals and preferences

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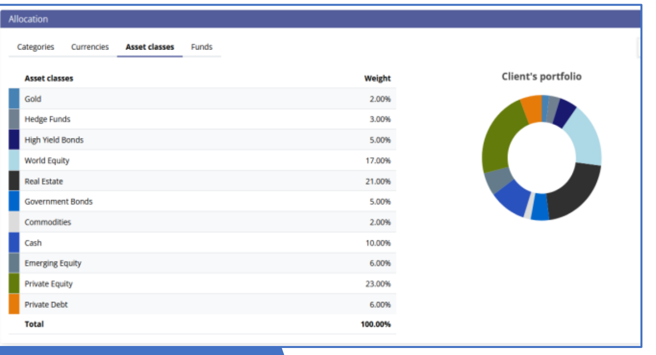
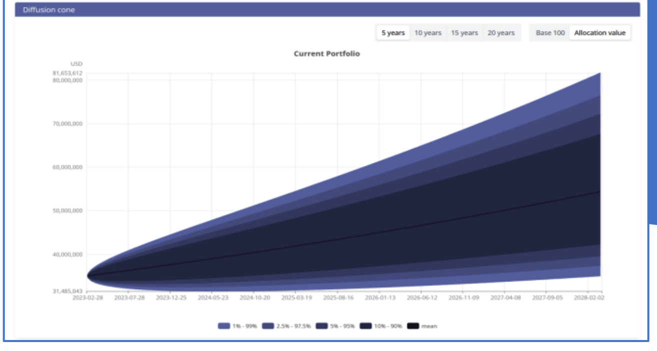
Portfolio optimisation



Cross-asset class

Global Wealth Approach

Simulations



Backtesting

A global asset class coverage with indices available off-the-shelf

in partnership with leading indices providers in the industry

- Bonds (Government, Corporate)
- Equities (Developed, Emerging Markets)
- Private equity (Global, Growth, Buy-out, Ventures, Secondaries)
- Private debt
- Real estate (Global, Core Plus, Value-added)
- Infrastructure
- Alternative strategies (Hedge Funds)
- Gold
- Cash

Key features

Cross-asset class

Optimization

Client-centricity

Explainability

Value for advisors

Client engagement

Fidelization

Proactivity

Operational efficiency

Value for end clients

Global wealth approach

Personalized advice

Transparency

Trust