



26 EAMS



100+

Relationship Managers



3 600 Portfolios



3 300

Beneficiary Owners



10 bn. in AuM



1.5 bn. Cash

Evolute Marketplace

Evolute is one of the largest and fastest growing providers of CRM/PMS software for independent wealth managers and multi family offices in Switzerland. With our integrated marketplace, we have built an innovative platform that connects our clients with providers of financial products and services:

Based on anonymized data, the needs of asset management clients are determined and individually linked to the best possible products and services.

Our Value Proposition

Wealth Manager

- Better standing with the client due to concrete and targeted investment proposals
- Higher convenience as investment proposals are generated through the system based on anonymous data
- Additional profits thanks to the marketplace offerings and active presentation by the asset manager

Product- and Service-Partner

- Display of their products and services on a new digital and efficient distribution channel
- Direct access to independent wealth managers and indirectly to their end clients
- Personalized and targeted offers can be made

Beneficiary Owner

- End clients receive data-based and individual investment proposals and services presented by the wealth manager
- Comprehensive and broader consultation that goes beyond financial matters
- Tailor-made experience and service

Evolute and Swiss Fund & Finance Platform

To optimize your reach, Swiss Fund & Finance Platform and Evolute have defined a joint service package:

Swiss Fund & Finance Platform

- 12 posts p.a.
- Product integration
- Event integration
- Integration in the newsletter



Evolute Marketplace

- 12 posts p.a.
- Product integration
- Event integration
- Integration in the newsletter

Partner Offering

| Positioning | Services |
|-------------------------------|---|
| Story-Box | Positioning of content of the partner on the marketplace of Evolute and Swiss Fund & Finance Platform (monthly basis) |
| Product / Service Integration | Listing of the product/service universe of the partner on the Evolute marketplace and Swiss Fund & Finance Platform |
| Event Calendar | Integration of events of the partner into the marketplace event calendar of Evolute and Swiss Fund & Finance Platform |
| Public Relations | Positioning as a partner of the Evolute marketplace and Swiss Fund & Finance Platform in the press |

| Licenses | Pricing |
|--|------------------|
| Platform p.a. | CHF 6 000 |
| Advertisement p.a. | CHF 12 000 |
| Partner discount p.a. 20%¹ | CHF 3 600 |
| Total excl. VAT p.a. ² | CHF 14 400 |

Revenue Share³

Variable participation on the sales generated by or through the Evolute marketplace during the 12-month term. The amount is agreed upon individually with the partner.

¹Partner discount only in combination with Swiss Fund & Finance Platform. Billing is done separately through Evolute and Swiss Fund & Finance Platform

²Incl. fee Swiss Fund & Finance Platform

³Only for Evolute Marketplace