

## Fully digital portfolio transfers in minutes

**Your Problem:** In many cases, transferring an existing portfolio to another institution poses financial and security risks and affects the end user experience by utilizing manual methods that are time-consuming and error-prone.

**Our Solution:** Qwist's Portfolio Switchkit service enables a simple and paperless transfer of a portfolio account in less than 10 minutes. Portfolio Switchkit enables customers to simplify and digitalize the whole flow, reducing cost and labor and ensuring a smooth end user experience: The final user will have a clear understanding of the whole switch in a very short time, with a full range of options in terms of transfers.

**10 min**

Time to switch - from hours to minutes

**17k+**

Portfolio switches last year

**40k €**

Average portfolio value per switch

### Benefits



**Increase value from end users**

Activate valuable end users from the start. A new end user will become most valuable because they will use the new portfolio as the main one.



**Attract high-value portfolios**

The average amount transferred by our end users is more than 40k €, with Millions of Euros being transferred each month.



**Reduce back office effort & costs**

Actively transitioning end users to the service as an online-only process on the desktop or in your app decreases the cost and effort related to customer support and back office.

### Why Qwist?



**Multiple types of transfer**

Portfolio SwitchKit offers different options in terms of transfers. From third parties, to donations, until personal transfers



**360° readout and overview**

We offer automatic portfolio readouts through our open banking platform, compliant with the PSD2 regulation, and we create a complete overview of all assets (stocks, ETFs, funds).

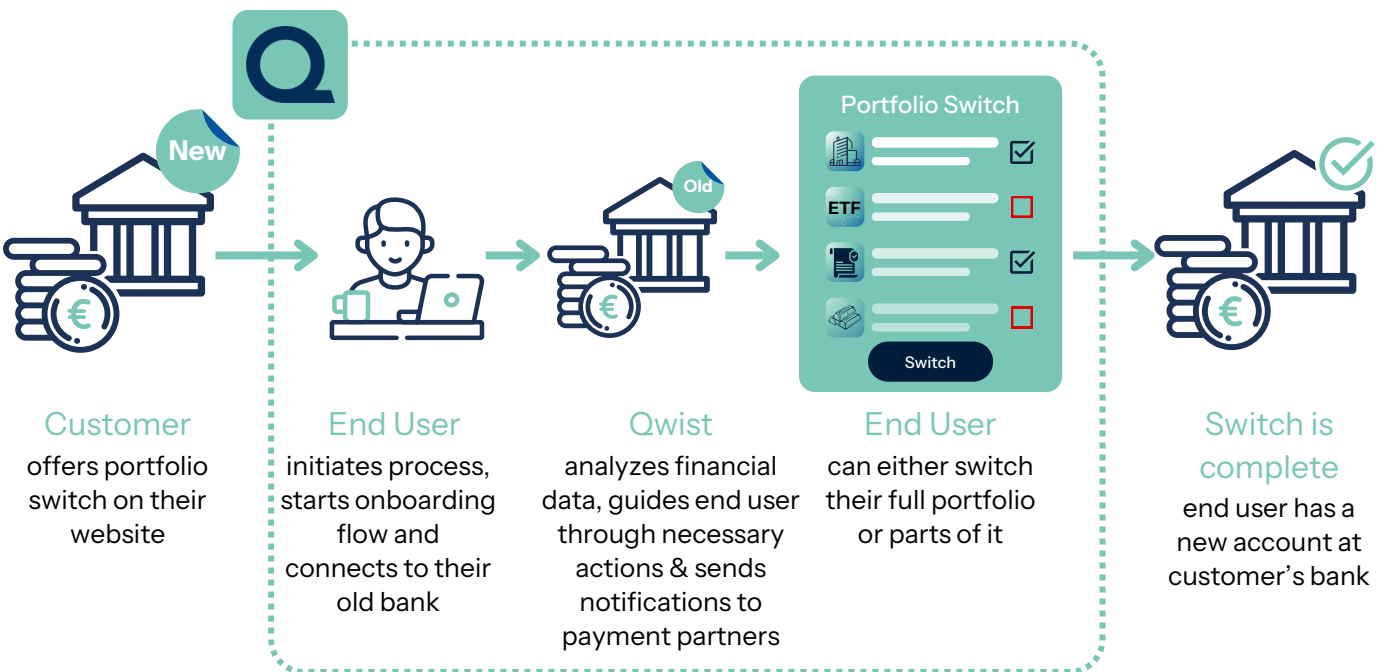


**Account closure**

End users can request to delete any pending orders and the possibility to close the old portfolio after the transfer of all assets.

## How it works

Smooth transfer of end user's portfolio in parts or as a whole



## Our complementary products

**Account SwitchKit**

Offer your end users seamless switching of their direct debits, incoming payments and standing orders through real-time access using Open Banking financial data, ensuring a fast and secure customer transition.

**ndgit Open Banking Suite**

*Bank Empowerment to deliver PSD2 Data:* We provide the tools needed to effortlessly meet current PSD2 requirements (and future regulations such as PSD3, PSR and FIDA) for delivering essential data.