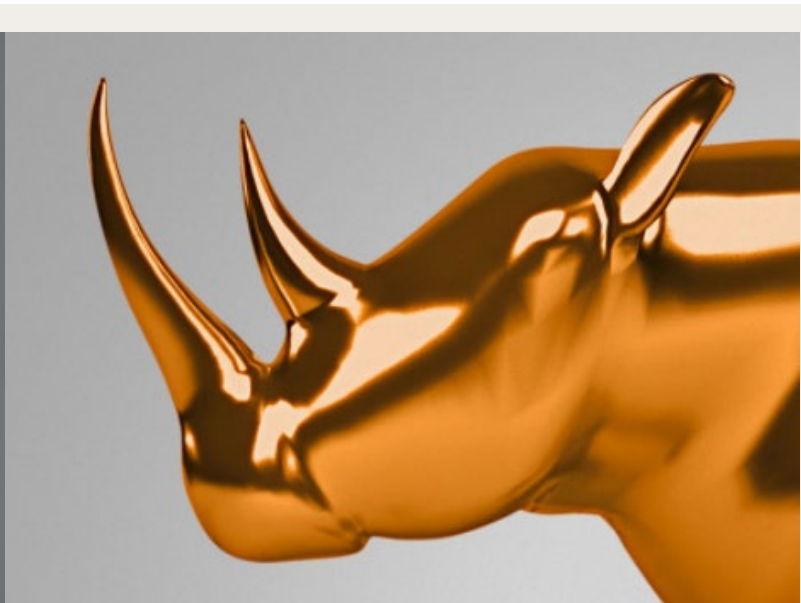


CUSTOMER
SUCCESS STORY



PARTNERS
alias

<https://www.aliaspartners.ch/>



Alias Partners at Glance

Alias Partners was established in 1972, making it one of the oldest independent wealth management firms in Geneva. With a team of 14 people and clients based mainly in Switzerland, Europe, Brazil, and the Middle East, the company's aim is to offer tailored solutions according to their clients' specific needs. Over the years, Alias Partners has set up a structure bearing in mind a long-term vision. And today, they continue their development by welcoming in new young managers, meanwhile planning the handover of existing clients in a most seamlessly manner.

The relationship with WIZE

Alias Partners has been working with WIZE by TeamWork since 2017, developing an excellent relationship with the team. The choice was initially made thanks to the geographical proximity of the team, the fact that data were hosted in Switzerland and the financial stability of the TeamWork Group. The solution creates added value daily through the standardization of data at all levels. WIZE teams' reliability and great availability, makes them an ideal partner with whom to face new challenges.

"Like Alias Partners, the desire to build a solid structure with customers at the center can be felt at WIZE through their support. If I can recommend the solution to my peers, I do. "

Philippe Ostan, CIO Alias Partners



Upcoming Challenges

The main upcoming project for Alias Partners is their request to be recognized as Manager of Collective Assets by the FINMA. This demands organizational changes with more processes and the obligation to prove that these are applied. This is where WIZE plays an essential part : the solution allows to apply the controls in an automated way with roles and functionalities defined towards each user.

Expected Results

Most FINMA's Compliance and Risk Management requirements for the application are in the 250+ functionalities available in WIZE. It will only need the activation of certain functionalities to allow Alias Partners to demonstrate how regulations are applied in an auditable way. WIZE Support Team will guide Alias Partners through trainings that take into consideration all these specificities. Thanks to the expertise acquired in collaborating with other customers who underwent a similar transition, WIZE offers additional support by sharing the problematics previously identified as well as the best practices to follow in order to avoid them.

Perspectives

Alias Partners is confident in the capacity of WIZE to meet their needs thanks to their expertise and qualitative support. In the future, WIZE will be used for more integrations. For instance, at transactional level, WIZE is now interfaced with quite a few depositary banks, which means that orders will be placed through WIZE, adding efficiency for customers with multiple depositary banks.

About WIZE



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