

Insigneo introduces proprietary 'alia' web-based platform enabling investment professionals to manage their practice more efficiently.

Alia is Part of Insigneo's Commitment to Invest in Best-of-Breed Technology Solutions

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Insigneo, a leading international wealth management firm, today announced its global launch of Alia, a proprietary Web-based technology platform designed to enable Insigneo's investment professionals to manage their clients' portfolios more effectively and efficiently.

Here's how it works: Using a single sign-on, investment professionals can seamlessly and securely log into Alia and manage all aspects of their international clients' portfolios while accessing consolidated views of client assets across financial institutions worldwide via the user-friendly, multi-custodian platform. This includes sending emails and other communications, as well as digital client onboarding, reporting, and data storage and retrieval.

Notably, Alia also enables Insigneo's 400-plus investment professionals to readily access all the tools and resources they need to do their work – including all the latest versions of required documents and agreements, which are automatically updated in real time. Custom-created for Insigneo and supported by Salesforce, Alia also provides investment professionals with a powerful CRM solution to manage their practice and relationship with their clients.

"Insigneo is proud to introduce Alia as part of our technology ambition to provide a differentiated and simpler approach to serving our existing clients globally while also providing a platform to onboard new investment professionals and their clients," said Javier Rivero, Insigneo's President and Chief Operating Officer. "We will continue to add new features and functionalities to Alia, which further distinguishes Insigneo and underscores our commitment to invest in leading-edge technological innovations."

Insigneo has been working to develop Alia, which was recently launched at its annual summit in Cuzco, based on a series of detailed discovery sessions to fully assess its investment professional's wants, needs, and desires. *"We developed Alia based on a series of detailed discovery sessions to fully assess our financial advisors' wants, needs, and desires. We incorporated the invaluable feedback of our financial advisors to custom-create a powerful, single sign-on, integrated platform that will further enhance the way we serve our financial advisors and, by extension, how they serve their clients,"* said Mariela Arana, Insigneo's Head of Client Relations.

Added Vikas Saxena, Insigneo's CTO and Head of Innovation: *"Looking ahead, we will continue to invest in the enhancement of Alia as part of our strategic vision to provide investment professionals with an advanced, integrated wealth-management and client-service solution that keeps them on the leading edge."*

About Insigneo Financial Group

Insigneo is a leading international wealth management firm providing services and technologies that empower investment professionals to successfully serve their clients globally. Insigneo leverages its customized solutions, client-first service, and custodial relationship with BNY Mellon's Pershing, as well as other leading custodians to provide a fully integrated, best-in-class independent wealth management platform. With over \$18B in assets, Insigneo supports more than 400 investment professionals serving over 30,000 clients. For more information, visit www.insigneo.com

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