



Customer
platform solutions
for fund managers





Digital Solutions

Investment management platform

A better way to manage your customer interactions

In the digital world we live in today, investors are demanding online solutions designed for usability through which they can access and manage their investments.

Complex, poorly designed application forms and processes lead to confusion and are a barrier to investment.

Invsta provides an online investment management platform for fund managers, designed to delight your customers and improve customer interactions with your range of funds.

With inbuilt customer administration and reporting functionality, your ongoing customer compliance requirements are taken care of.

A platform for fund managers

Customer Interface

With a slick design and great functionality, the Invsta platform makes it easy to attract and retain investors into your funds. Through a simple online account opening and integrated AML/KYC process, investors can quickly set themselves up, make an investment, and easily track and manage their investments.

Management Portal

Through the platform you are provided with your own management portal, storing investor details and compliance documentation. The online account opening and verification process reduces your administration burden, saving you time and money.

Easy Compliance

Our online account opening process easily captures, verifies, and stores all KYC and AML information, reducing the cost and time you spend on each new customer. Ongoing compliance requirements are taken care of through our automated alert systems.



Built by professionals

The Invsta team have over 35 years of financial market experience, combined with more than 30 years of technology development. We know the finance side of things, and we know the technology side of it too. "FinTech", is at our very core, it's what we live and breathe.

Over the last 3 years we've developed a range of cutting edge fintech products, including robo-advice platforms, consumer budgeting software, and cryptocurrency investment platform solutions. We are focused to empower smarter investing through innovative technology.

An interface that customers love

Invsta has been developed with the end investor in mind. Our platform helps to cut through the complexities often associated with investing, providing customers with an experience that will keep them coming back for more.

- **Simple account opening**

Our quick and simple online account creation means no more arduous application forms or complex processes, we also capture and verify AML & KYC requirements.

- **Easy to invest**

After opening an account, customers can browse investment options and make an investment with the click of a button.

- **Manage & top up**

Customers can check into their account at any stage to track performance and other details, get updates from you, and easily add to their investment.



Simple management & compliance

The Invsta platform simplifies customer management and ongoing compliance requirements.

This can be customized to suit your current processes, and integrate with existing service providers to deliver the features that are important to your business.

- **Customer account creation**
- **Integrated AML & KYC**
- **Display your fund or range of funds**
- **Ongoing customer compliance**
- **Investment via click of a button**
- **Set minimum investment amounts**
- **Customer communications**
- **Management reporting**
- **Mobile app**

“I love how quick and easy it was.”

- Kadri

“I just want to say that I love your site.”

- Janion

“I love the easy to manage website and dashboard.”

- Adam

Talk to us for more information, or to discuss how we can simplify your customer management and compliance requirements and provide you with a customer portal that your investors will love.



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Visit our website
for more information

www.invsta.com