

## inApp

## Use Case 3 - Product placement &amp; Tax suitability



## ► SCENARIO

Loris, a relationship manager working for a Swiss Asset Management company, believes that a long mini future on a Swiss company will be an attractive investment for his client Julien, who is domiciled in France. The investment product is registered in France but not listed on the Swiss Market exchange.

## ► CHALLENGES

Loris isn't sure whether he can propose this product to Julien.

## MANUAL PROCESS

- ✗ Access to the Country Manual Products France.
- ✗ Understand which asset class and rules apply.
- ✗ Understand which rules would apply in the various circumstances.
- ✗ Understand which asset class and rates apply,



Several hours based on complexity.

## WITH INDIGITA

- ✓ Define the client profile and situation in just a few clicks.
- ✓ Copy-paste a list of ISINs.
- ✓ Instantly receive tailored compliance answers based on the search.



A few seconds

## ► KEY ADVANTAGES OF INAPP

- ✓ Ensures accurate and tailored solutions for each client, every time.
- ✓ Effectively manages risks across multiple jurisdictions, ensuring compliance at all times.
- ✓ Minimize the risk of fines from both foreign and domestic authorities by ensuring compliance with relevant regulations.

## INTERESTED?

Contact us at [info@indigita.ch](mailto:info@indigita.ch)  
Or, directly book a demo via QR code:



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