

PRESS RELEASE

Definet selects fundsaccess to provide investment advice technology for its advisors

- **Definet, based in Eschborn, will be using the fundsaccess technology for their investment business from the beginning of next year.**
- **Advisors of Definet-Group companies Formaxx and Mayflower Capital, will also have access to leading investment technology.**
- **The new customer relationship boosts the fundsaccess platform with another strong partner.**

Munich, 08.12.2022 – fundsaccess, with over 20,000 connected advisors a market-leading provider in the IFA wealthtech segment, has won a new customer for its platform technology.

Starting in early 2023, financial advisory firms serviced by Definet as well as Formaxx and Mayflower Capital will be working with fundsaccess's white-label technology for their investment advice business.

The range of services provided by fundsaccess includes advisory technology for both initial onboarding of new customers and existing customer advisory services. Both modules are complemented by e-signature component and a fully electronic processing via API. The technology supports the entire universe of funds, including AIFs, as well as the distribution of DPM solutions in a fully compliant manner. The off-the-shelf white-label technology will be connected to Definet's CRM system, tailored to its specific sales and product needs, and configured for cooperating custodian banks.

Rolf-Henning Hackel, Chief Commercial Officer at fundsaccess, said: "We are delighted to have won Definet, one of the leading German service companies for financial service providers, as a customer. Having won the broad selection process based on qualitative aspects fills us with pride."

Jörg Röckinghausen, Managing Director at Definet, said: "The experience and expertise of the fundsaccess team as well as the scope of the white-label platform convinced us of a partnership with fundsaccess. We look forward to a long-term cooperation."

About fundsaccess:

fundsaccess AG is one of the leading SaaS providers of digital advisory technology in the German-speaking market and the market leader in the German IFA segment. fundsaccess offers white-label technology along the entire advisory process and serves well-known insurance companies, wealth managers, financial advisory firms, and broker pools. The product range includes investment advisory and portfolio optimization systems, client and advisor portals, product databases, and a multi-custody client management system.

About Definet:

DEFINET AG offers comprehensive back office services for financial advisory companies and individual brokers with a permit under § 93 HGB. Connected partners receive services such as training, marketing and sales support, and product recommendations from a single source. In addition, there are performance modules tailored to the financial advisory industry such as IT services and sales impulses through networking with other market participants via the DEFINET community. The service spectrum is based on a flexible modular concept.

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