

additiv

 Interactive
Brokers

additiv x Interactive Brokers out-of-the-box front-to-back wealth solution



About additiv and Interactive Brokers

additiv has completed its integration with Interactive Brokers, allowing for a fully integrated, white-label, front-to-back investment and advisory platform. This integration combines Interactive Brokers' industry-leading expertise in execution, custody and back-office services with additiv's advisory and automation suite, including innovative front-end technology, enabling to seamlessly launch an out-of-the-box digital investment platform with a regulated custodian. The solution provides a scalable way to unlock new revenue streams for banks, deepen engagement with existing clients, and effectively serve all customer segments.

Why choose additiv and Interactive Brokers?

De-risked operating model:

Leverage two industry leaders for specialized expertise

Seamless integration:

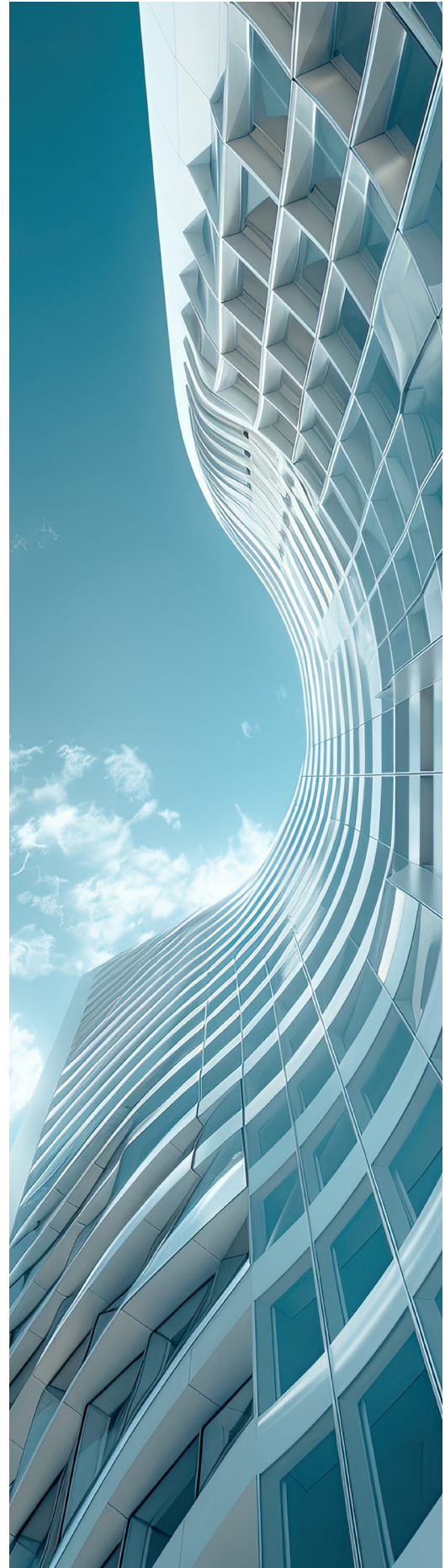
Leverage pre-built integrations for quick deployment with customizable branding.

Innovative technology:

Rely on top-tier technology designed to deliver unmatched scalability, adaptability, and operational excellence.

Proven expertise and global reach:

Interactive Brokers, a trusted securities firm with \$16.6 billion in equity capital and 47 years of experience, offers access to over 150 global markets and services clients in over 200 countries and territories.



Key benefits:



Customer engagement

- **Enhanced customer conversion:** Streamlined onboarding processes integrate client registration, regulatory compliance, and identity verification, ensuring a smooth account opening experience.
- **Optimized client interaction:** Interactive, intuitive, and white-label interfaces enable clients to track their goals, monitor portfolio performance, and make well-informed investment decisions.



Scalable advisory options

- **Hybrid advisory:** Combine digital self-service tools with human advisory support to meet the needs of all customer segments.
- **Robo-advisory solutions:** Deliver cost-effective, automated advisory services, specifically designed for underserved and cost-conscious client segments.



Comprehensive product and offering

- **Tax-wrapped investment accounts:** Offer a variety of tax-efficient accounts, including Stocks and Shares ISA and JISA, alongside other account types like GIA, to cater to diverse client needs.
- **Portfolio management:** Provide advanced tools for portfolio rebalancing, strategy adjustments, and exploring core-satellite investment approaches.
- **Comprehensive model and discretionary portfolio services:** Design & manage MPS and DPS to cater to a broad spectrum of customer investment preferences.



Institutional infrastructure

- **Trade execution and settlement:** Ensure efficient, accurate trade execution settlement with global market coverage and seamless integration.
- **Investment products:** Deliver low-cost, high-speed trading across multiple asset classes, including equities, ETFs, mutual funds, bonds, derivatives and more.
- **Custody services:** Offer secure safekeeping for client assets, supported by comprehensive and transparent reporting capabilities.



Regulatory and compliance benefits

- **Automated compliance:** Ensure adherence to MiFID II standards, incorporating automated processes for risk profiling, suitability checks, ongoing relationships, and reporting.
- **Consumer duty alignment:** Design advisory and investment solutions to deliver measurable customer benefits, ensuring alignment with regulatory expectations.

About additiv

additiv empowers the world's leading financial institutions and brands to create new business models and transform existing ones. additiv's API-first cloud platform is one of the world's most powerful solutions for wealth management, banking, credit, and insurance. The technology, together with the global ecosystem of regulated financial services providers, opens up new opportunities for banks, insurance companies, asset managers, IFAs and consumer brands to quickly and flexibly offer their own and third-party financial solutions through existing or new customer channels.

Headquartered in Switzerland with regional offices in Singapore, Indonesia, UAE, Germany, the UK, and development centers in Eastern Europe. With more than 250 employees, additiv serves over 400 financial institutions (banks, insurers, asset managers, pension providers, IFAs, etc.) and brands globally.

About Interactive Brokers

IBKR helps hedge funds, financial advisors, proprietary trading groups, and introducing brokers build competitive advantage, efficiently manage their business and serve their clients at lower cost. Its clients can fund their account and trade in up to 28 currencies, access 150 global markets, use award-winning desktop, mobile and web trading tools, and invest in equities, ETFs, options, futures, currencies, bonds, funds and more from a single unified platform.

Now in its 47th year, Interactive Brokers is a pioneer in online trading and a premier securities firm with US \$16.6 billion in equity capital.¹ Interactive Brokers Group and its affiliates execute approximately 3,118,000 trades per day.

¹ Interactive Brokers Group and its affiliates. For additional information view our Investors Relations - Earnings Release section by [clicking here](#).

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