

A new FinTech-assistant for relationship managers

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Private bank Julius Baer launches a digital tool for its advisors: The Digital Advisory Suite (DiAS) - co-developed by Zühlke as the main partner - improves compliance, automates processes and supports advice with personalized investment proposals.

Individual and personal advice is an important asset for Julius Baer. A new [FinTech-assistant](#) will further improve these conversations with clients and develop tailor-made offers. Within a few minutes DiAS provides advisors with investment proposals and automatically considers compliance risk. This increases the quality of the advice and reduces the administrative work of the advisor. At the same time, the client receives a tailor-made offer based on intelligent data.

More than 40 Zühlke specialists helped develop the private bank's new digital advisory portal. The needs of Julius Baers' advisors were implemented within a very short time and the private bank not only benefits from the long-term transfer of know-how, but also from lower costs, higher returns and a short time-to-market.