

FOR CLIENTS & INVESTORS

Your banking. With less effort.

A clearer path from your first application to everyday money tasks, with help when you need it.

HYBRID BANKING / A CONNECTED BANKING ECONOMY

YOUR BANKING

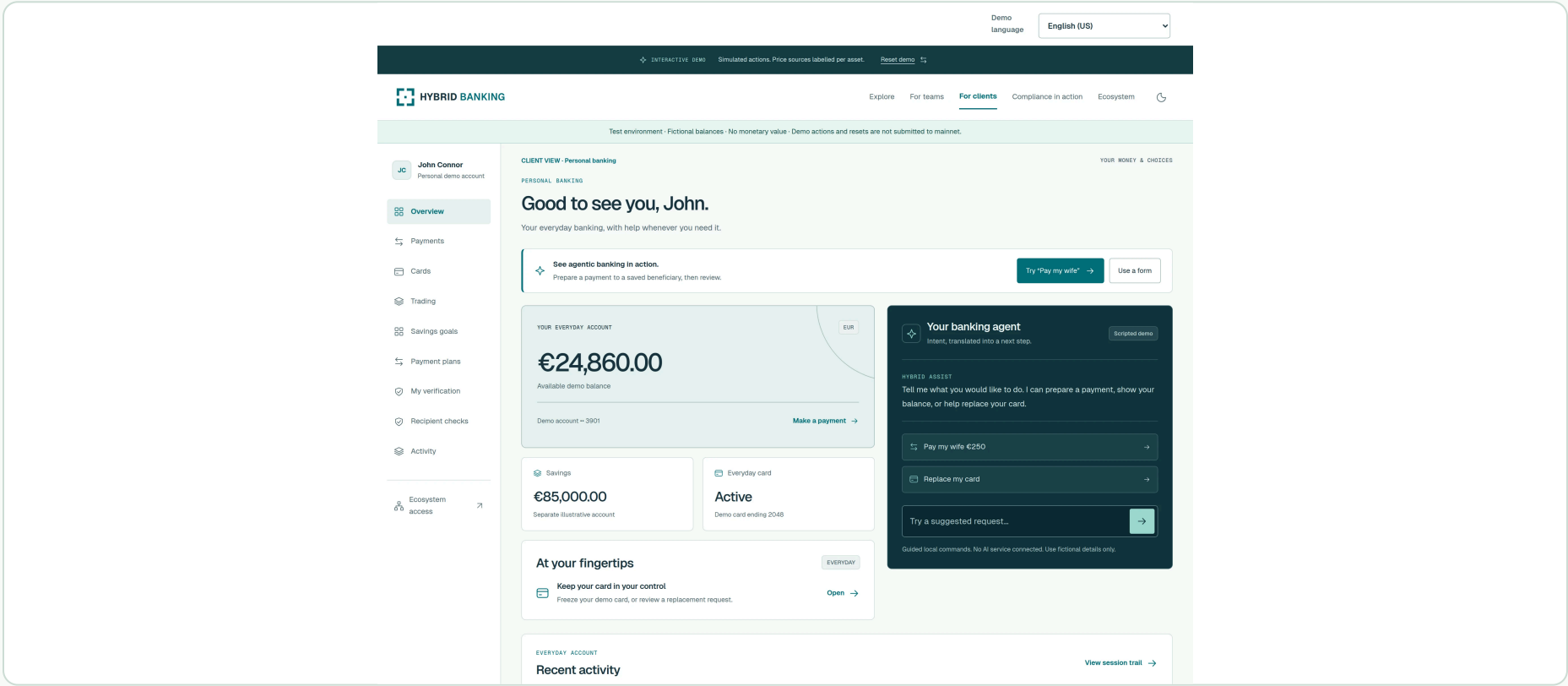
A clearer day.

- Pay
Prepare an instruction
- Plan
Organize your goals
- Ask
Keep help in reach

Your banking day, in one place.

Start with the task you want to complete, then follow its actual status.

PRODUCT PREVIEW · FICTIONAL DEMO RECORDS



Understand your position

Review accounts and financial context. Available funds can differ from the ledger balance when money is reserved.

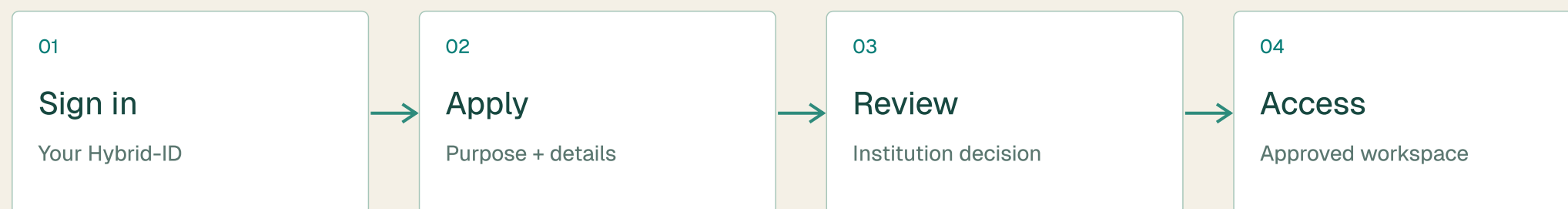
Keep the next step clear

Move into payments, savings, portfolio information or a service conversation.

02 / FROM IDENTITY TO ACCOUNT ACCESS

A familiar identity. An accountable welcome.

Hybrid-ID supports sign-in. The institution still decides whether it can accept your banking relationship.



Less repeated entry

Use supported identity evidence with the required consent.

A visible review

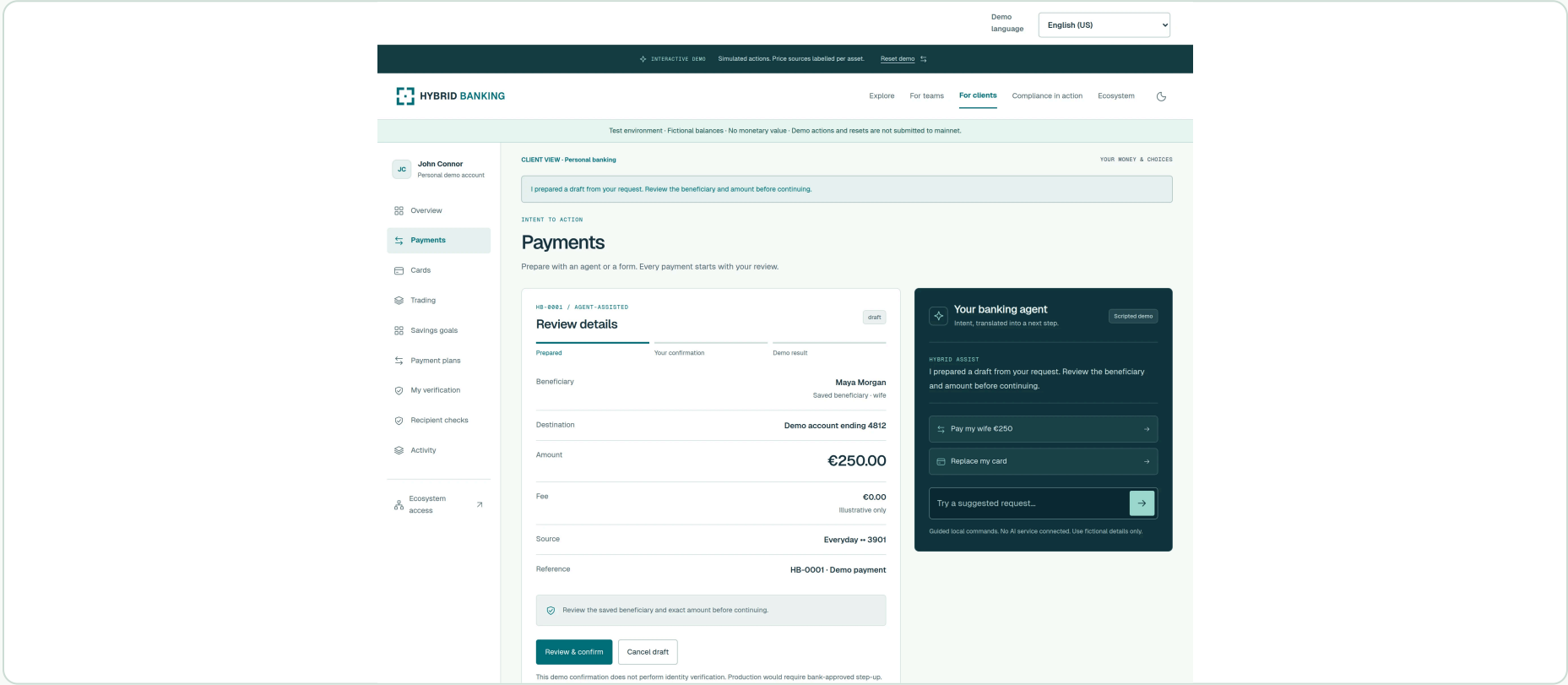
Missing or unresolved information needs attention.

A clear starting point

Pilot account access does not create real funds.

Prepare the payment. Review the details.

PRODUCT PREVIEW · FICTIONAL DEMO RECORDS



Choose deliberately

Select the account and recipient; enter amount, currency and purpose.

Confirm what matters

Review the exact instruction. Required controls and employee review still apply.

Give future plans a place in today's banking.

SAVINGS

Set a goal. Track the allocation.

Allocate or release money toward a goal while keeping the account ledger authoritative. A savings allocation is not an investment return.

PAYMENT PLANS

Prepare recurring work.

Create, pause or cancel scheduled instructions. The pilot scheduler creates drafts that still need confirmation and review.

Visible availability

See why funds may be reserved.

Deliberate changes

Confirm transfers between your own accounts.

Traceable progress

Follow generated drafts and their status.

See the position.

Understand the information.

01	Portfolio context	Review recorded holdings and custody information; do not confuse a displayed record with a broker-confirmed execution.
02	Research with provenance	Inspect available market quotes and their freshness. Missing or stale prices remain visible.
03	Try an instruction	The public demo simulates stock and crypto purchases. Pilot order workflows stop at review and awaiting-broker status.

Ask for help. Keep control.

“Help me prepare a payment to my approved recipient.”

Prepare

The current guided assistant organizes supported requests.

Confirm

Review the exact action; identity is not unrestricted spending authority.

Follow up

Use the secure inbox for service requests and employee responses.

07 / TRY THE CLIENT PERSPECTIVE

Start with one everyday task.

Explore the client workspace, try a simulated payment and follow the result. Then see how the institution reviews the same journey.

[Try the client demo ↗](#)[Take the guided tour ↗](#)[Browse client resources ↗](#)

Explore with fictional records. Discuss the institution's required controls and connections before moving to real financial services.