



FA SOLUTIONS

Brand Kit

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Check our [media page](#) for downloadable visuals (Logos & photos section)

1. Introduction to FA Solutions

1.1 Our name

“FA” in FA Solutions stands for “FinTech Advantage” as with our product we give Wealth Managers an edge compared to other players in their industry through use of cutting-edge financial technology.

For simplicity, just “FA” is perfectly acceptable to refer to both the company and our product, FA Platform. In certain cases, FA may be followed by a capitalized noun, as in “FA Team” when talking about our employees or “FA Family” - the collective name we use for all our clients.

Though some clients also use “FAS,” this abbreviation is **not** in line with our brand communications best practices and is **not** to be used in the press or other media.

Our product, FA Platform, has several integral parts, each with their own name and purpose. FA Back is used by Back Office employees at Wealth Management companies and it includes features like rebalancing, fee calculation, and reporting. FA Front, on the other hand, is used by Front Office specialists and it includes analytics, CRM, and trading functionality. Finally, for the end clients there is the FA Client Front which presents portfolio performance in a visual way and helps customers manage their documents, among other things. The features of FA Platform are typically referred to as “modules”, e.g. “the accounting module.”

Our industry also has many names, the most prominent ones being Wealth Management, Investment Management, Portfolio Management, and Asset Management. While all are correct, we have a strong preference for the first and, when variety is needed, second formulation. The third and fourth are sometimes misunderstood because they are also used in other contexts (Project Portfolio Management, Enterprise Asset Management), so we prefer to avoid them when possible.

1.2 Our story and key company figures

Efficiency, reliability, and flexibility - this is what customers appreciate the most in FA Solutions. The company was founded in 1999, and since then we have successfully expanded, with offices in 3 countries and a worldwide client base of more than 70 customers in highly regulated markets in Asia, Europe, Africa, and the Middle East. The company has been growing on average 43% p.a. in turnover for the past five years - we are profitable, and we grow fast.

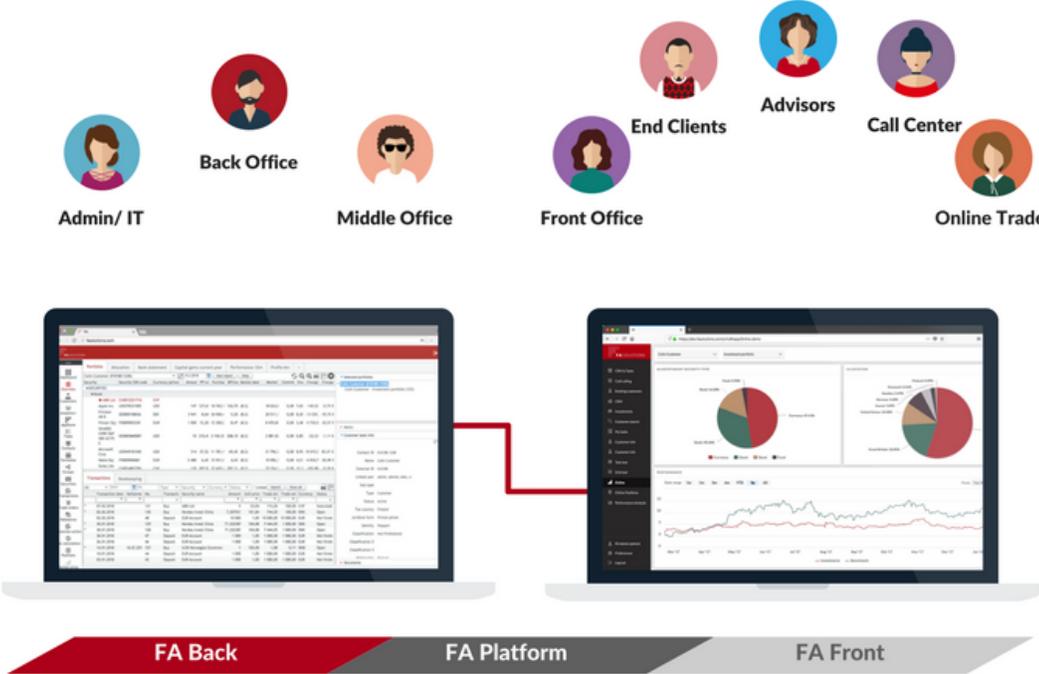
Our experience in the industry has allowed us to build FA Platform - a single cloud-based solution for Back Office, Front Office, and end client needs, which is trusted by Wealth Managers around the world. We leverage technology to give our clients more time with their clients.

1.3 Our product and key product features

FA Solutions is a product company dedicated to offering superior Portfolio Management solutions to Asset Managers, Fund Managers, Private Banks, Robo Advisors, and Family Offices.

We provide cloud-based software called FA Platform which enables Wealth Managers to manage all their data in one platform, always accessible on any device. FA Platform is a modern SaaS solution that empowers you to grow where older solutions would limit you. Our transaction-based, multi-currency Portfolio Management system is easily adapted to different needs in an increasingly regulated financial market.

Delving into more detail, here is a more visual summary of the top FA Platform features:





IBOR+

With FA you have everything in a single system from back, middle, and front offices, all the way to a client portal.



Modularized Platform: "Click and Go"

FA Platform adapts easily for different needs – just select the modules most suitable for your business.



Cloud Solution

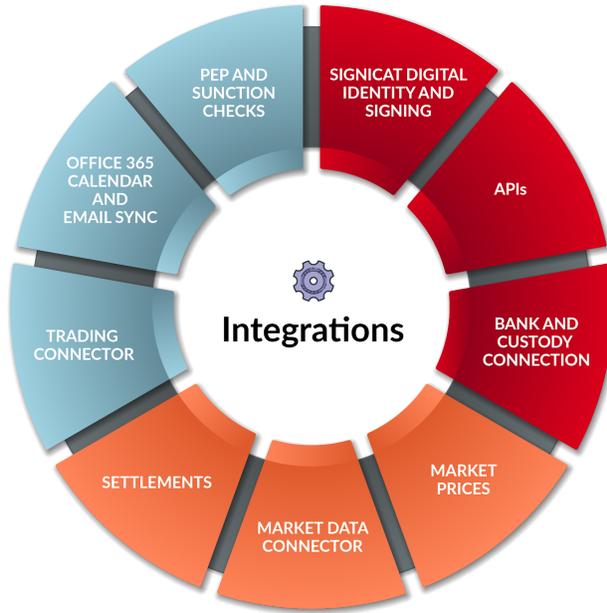
Forget the IT hassle, all you need is an Internet browser! We offer you a carefree and secure Software as a Service.



Variety of APIs and Integration Possibilities

FA Platform enables modern connectivity for automating data transfers.

For more information on FA Platform, check out our [products page](#)



1.4 The people behind our success



[Juha Lehtonen](#), *FA Solutions Founder & CEO*

As a son of an entrepreneur, Juha Lehtonen - the CEO of FA Solutions - was driven to start his own company one day. Upon finishing his Master's in Economics, Juha worked in finance but also enjoyed technology and coding. So, he trained himself to code and founded FA Solutions, at first as a FinTech consultancy.



[Hannes Helenius](#), *Chairman of the Board at FA Solutions*

Hannes Helenius, Juha's old acquaintance, joined the company as a business partner, bringing to the table a lot of FinTech experience and a broad network, which led to rapid expansion of FA's client base in Finland.

In 2008, after almost a decade of successfully serving major banks and other financial organizations, a strategic decision was made to transform FA Solutions into a product company, focused on developing modern SaaS Wealth Management software. This is how FA Platform came to be - the first version was released in 2010.



[Richard Nordin](#),

Managing Director at FA Solutions UK



[Robert Wennerström](#),

Managing Director at FA Solutions Sweden

After FA Solutions became a market leader in Finland, it was time to expand globally. Richard Nordin and Robert Wennerström helped establish FA presence in Sweden which opened doors to growing the client base further both in and out of Nordic Europe.

Now that FA Platform has become a household name in the Nordics, we are moving towards new horizons. In 2019, we opened a new office in London with ambitious plans to conquer the UK market - one of the major global financial hubs.

None of this would be possible without the FA Team - dedicated specialists who develop and promote FA Platform as well as help the company act on new opportunities quickly. We are currently over 60 people spread across three FA offices, and we keep growing.

1.5 Boilerplate for press

FA Solutions is the leading Nordic provider of software for Wealth & Fund Managers, Family Offices, and Banks, helping them manage their clients' wealth globally. We offer a cloud-based Portfolio Management solution that automates and centralizes a wide range of operational

processes into one easy-to-use FA Platform. We believe superior technology enables quality Wealth Management services for everyone. For more information, visit www.fasolutions.com.

1.6 Our tone of voice

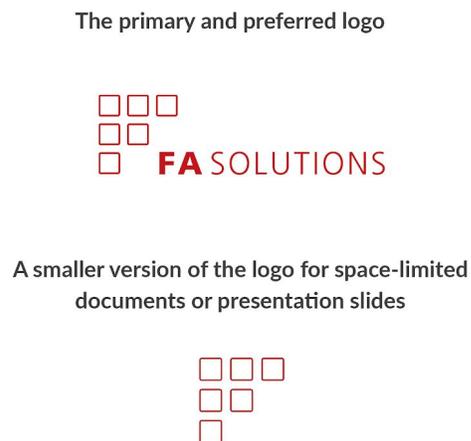
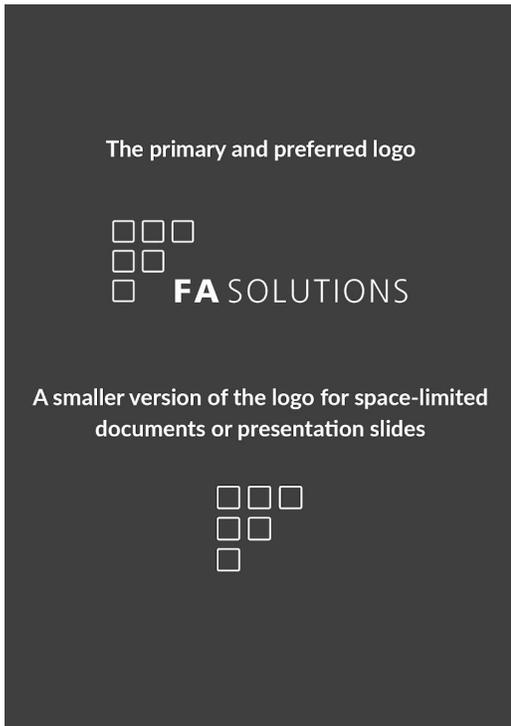
As a trusted partner to our clients and a knowledgeable player in FinTech, FA speaks in a formal and serious tone, with quiet confidence. We aim to make complex Wealth Management issues simple to understand and we believe in the Nordic “tell it as it is” communication style - no sugarcoating.

At the same time, FA has a lighter side as well. We always remain warm and approachable towards our audience, be they our clients, partners, prospects, or followers of our social media channels.

2. The visual identity of FA Solutions

2.1 FA logo and how to use it

Below are versions of our logo for dark and light backgrounds. The original files for download can be found on our [media page](#) (Logos and photos section).



2.2 FA font and how to use it

The main font of FA Solutions for all purposes is Lato.



Interesting fact

“Lato” means “summer” in Polish

Its clean, elegant look represents FA’s professionalism and modesty. We use the bold version for titles and subheadings, italics for image captions, and Lato Regular for body text (rarely Lato Light).

Characters:

AĂÅBCĆDEFGHIJKLMNOÖPQRSŠTUVWXYZŽ
ääåbcćdefghijklmnoöpqršstuvwxyzž
1234567890‘?’“!”“(%)[#]{}@}/&\<-+÷x=>®©\$€£¥¢;:,.*

Styles:

Thin
Thin Italic
Light
Light Italic
Regular
Regular Italic
Bold
Bold Italic
Black
Black Italic

Usage example:

The spectacle before us was indeed sublime

Apparently we had reached a great height in the atmosphere, for the sky was a dead black, and the stars had ceased to twinkle. By the same illusion which lifts the horizon of the sea to the level of the spectator on a hillside, the sable cloud beneath was dished out, and the car seemed to float in the middle of an immense dark sphere, whose upper half was strewn with silver. Looking down into the dark gulf below, I could see a ruddy light streaming through a rift in the clouds.

When Lato is not available, we recommend using Arial.

2.3 FA brand colors and how to use them

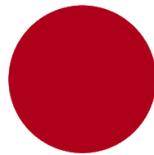
Below are the colors associated with FA Solutions. Our primary colors show what FA stands for:

- **Bright red** reflects FA's commitment to innovation and bold proactive development, which allows us to stay ahead of the competition
- **Granite gray** demonstrates FA's stability and consistency - we have a long-term view in everything we do

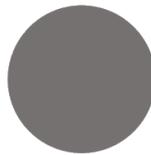
White helps us offset the other two strong colors by providing contrast to them. Avoid overusing gray and red, as their purpose is to put emphasis, not to overpower.

Our primary colors are recommended for use in prominent positions - article titles and subtitles, letterheads, Call-To-Action buttons, etc. Most importantly, they must be featured in presentations, brochures, flyers, and any other marketing or sales material whose purpose is to promote FA Solutions, as they are at the heart of the brand. Avoid using different shades of these - our primary colors look best at 100% strength.

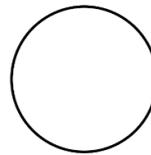
Primary Colors



PMS - 20-0069
CMYK - 0/100/85/32
RGB - 174/0/26
HEX - #ae001a



PMS - 8422 C
CMYK - 0/4/4/54
RGB - 118/113/113
HEX - #767171



PMS - P 75-1 U
CMYK - 0/0/0/0
RGB - 255/255/255
HEX - #ffffff

Secondary Colors



PMS - 7579 CP
CMYK - 0/62/78/13
RGB - 221/84/49
HEX - #dd5431



PMS - 2420 XGC
CMYK - 81/0/46/25
RGB - 36/191/103
HEX - #25bf67



PMS - 14-0957 TPG
CMYK - 0/23/81/1
RGB - 253/195/47
HEX - #fdc22f



PMS - 19-4201 TSX
CMYK - 0/0/0/85
RGB - 38/38/38
HEX - #262626



PMS - P 179-1 C
CMYK - 0/0/0/5
RGB - 241/241/241
HEX - #f1f1f1

The secondary colors are perfect for situations when you need variety - for example, in charts and graphs. These can be changed and shades may be used as needed. However, in any case where the design needs are simple and only 2-3 colors are required (e.g. in a journal article or a one-pager), preference should always be given to primary colors used in their original form.

Of course, body text of any material is best written in plain black - avoid using brand colors unless you wish to emphasize a specific sentence or two, e.g. a quote or an excerpt. For such rare cases, FA's primary colors - red and gray - are most appropriate.

3. FA Solutions in the press

3.1 Our media mentions

The Wealth Mosaic, a global market network and knowledge resource for wealth managers, has interviewed Richard Nordin on how essential it is to provide up-to-date technology to serve Family Offices' investment needs these days:

→ [Link to the full article](#)

FA Solutions was recognized in The 10 Most Trusted Asset & Wealth Management Solution Providers 2017 by the globally distributed Insights Success magazine:

→ [Link to the full article](#)

In 2017 FA Solutions was awarded in the yearly awards of Wealth & Finance International in the Ones to Watch category as the Most Innovative Software Solutions Provider in Northern Europe:

→ [Link to the full article](#)

Finextra featured FA Solutions after launching a new technological innovation that enables companies in the financial industry to form efficient value networks:

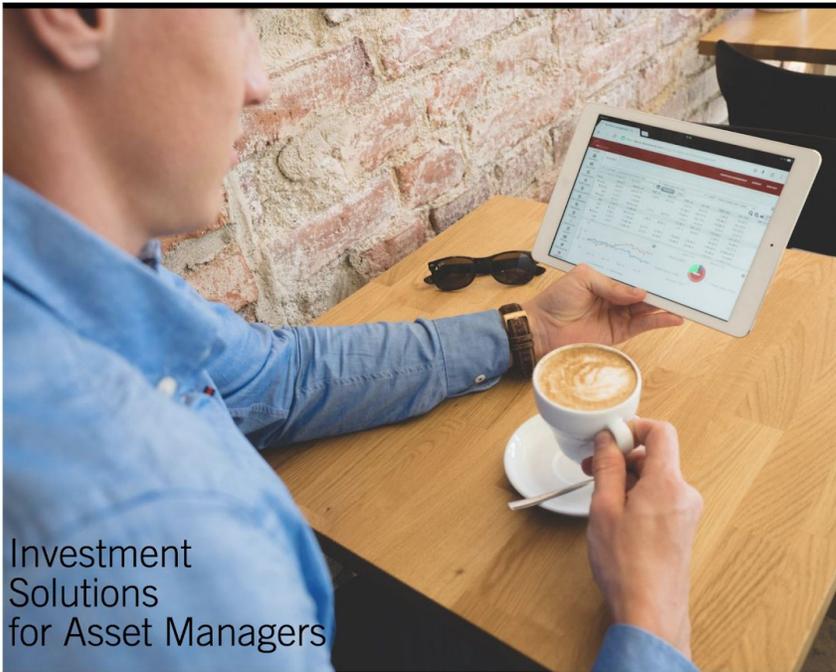
→ [Link to the full article](#)

Bobsguide mentioned FA as one of FinTech companies delivered the pioneering web based solution that combines Financial Assets Management with their Debt Management for Kommuninvest:

→ [Link to the full article](#)

In 2016, Wealth & Finance International magazine featured FA Solutions as a great investment solution for Asset Managers:

→ [Link to the full article](#)



Investment Solutions for Asset Managers

Wealth & Finance International | March 2016

www.wealthandfinance-intl.com

FA Solutions offers investment & asset management software for capital markets. The FA platform includes modules like portfolio management, bookkeeping, investment analysis, reporting, model portfolio management and rebalancing, fee and cost calculations, CRM and online module for end users. FA platform can be used easily for example in Robo Advisory business.

Nowadays in asset management the winner is the one who has the best technologies. Technology continues to play an important role in the investment process. We have a long and successful experience of deployment solutions for the financial industry as a service and on premises. With us our clients have ready-made components for integrations, connections and technical support. We are a market leader in private cloud solutions and we see a growing need for flexible, cloud based solutions, as it is becoming a standard for the financial industry.

Basically we offer a modern investment management platform where our clients can manage their entire asset management business in one software, and reach better efficiency by automating processes and reports that take a lot of time when done manually. Portfolio management and investment accounting is the core of FA platform. Whether you're an equity-based local advisor or a full-scale enterprise with global, multi-asset-class portfolios with complex PF-instruments, we offer a solution that fully adapts your needs and processes.

Moreover, we have experienced a strong competitive edge for our solution because of the flexibility and high capability to configure the platform for various needs in the capital markets. We have clients from buy and sell side of the market, from single family offices to banks. We are growing especially in segments where the financial regulation takes effect, not only in banks but also for example in pension funds.

We at FA Solutions help our clients to concentrate on their core business and we release them from worrying the functionality and maintenance of the software. The latest release of the platform is always included in the monthly fee which means that the client has always the latest and best technologies in use. This makes our clients very agile in the capital markets. Furthermore, they can introduce new businesses or products without the complexity of software projects.

Looking ahead to the future, we have product development ongoing all the time, and we just released FA AppStore to our platform. Currently, clients are familiar with all kinds of app stores from their personal like mobile phones, computers and gaming. Now for the first time this app store functionality is brought to business softwares and to the financial industry. With FA AppStore users can easily install the kind of reports, processes and components they need for their use. With a click of a button, and with a familiar user experience from their everyday life. We are simplifying the complex world of investment management for our growing number of clients.

Company: FA Solutions
Name: Hannes Helenius
Email: hannes.helenius@fsolutions.com
Web Address: www.fsolutions.com
Telephone: +358 20 7118 514

Good News from Finland wrote an article mentioning that FA Solutions have been chosen to be the asset management software provider for an investment management company operating in the Middle East and London in early 2016.

→ [Link to the full article](#)

3.2 Our press releases

All press releases are available through this link:

<https://fasolutions.com/materials/#press-releases>

Our latest press release:



[FA Solutions delivers a new Discretionary Asset Management solution for Max Matthiessen](#), 04.12.2019

3.3 Our own channels

The main channel where we publish original content regularly is [FA Solutions blog](#). We also publish original videos on [Vimeo](#). The primary social media channel for FA Solutions is [LinkedIn](#) where we connect with current and potential customers. We also have an active presence on [Facebook](#) and [Twitter](#), as well as [Instagram](#), where we publish more informal content targeting potential employees.

Any channels not listed above are not official and must not be tagged or referred to in association with FA Solutions.

3.4 Our press contacts



Elena Lundaeva

Marketing Manager

+358 20 7940 769

elena(a)fasolutions.com

[Connect with Elena](#)



Hannes Helenius

Head of Sales and Marketing

Chairman of the Board

+358 20 7118 514

hannes(a)fasolutions.com

[Connect with Hannes](#)

4. Our achievements to date

4.1 Our clients

Our client network is as international as FA itself. We currently have customers in Europe, Southeast Asia, Caribbean, Middle East, and Africa.

You can find up-to-date feedback where FA clients talk about their experience with our company and the solution on our [reference page](#). We also have several customer interviews available on our [reference video page](#).

Some examples of what our clients have said about FA Platform:

“A new innovative solution which combines multiple engines in one system with a superior user experience.”

– Kommuninvest, the largest lender to the public sector in Sweden with total assets around USD 42 billion

“We are able to minimize the manual reporting and NAV calculation work with FA.”

– FCG Fonder, AIFM Fund Administrator

“FA’s software adapts flexibly to our critical business processes rather than the other way around.”

– Alexandria, one of Finland’s largest investment service companies

4.2 Our partners

FA works with multiple partners to provide customers a secure, scalable solution with up-to-date market data and advanced trading functionality. You can access the full list of companies we collaborate with on our [partners page](#). FA Solutions is also currently building a Value-Added Reseller (VAR) partnership network.

With any questions regarding our partners, please contact:



Joonas Vikström

📁 Partner Relations Manager

📞 +358 20 7940 763

✉️ [joonas\(a\)fasolutions.com](mailto:joonas(a)fasolutions.com)

 Connect with Joonas

4.3 Our awards

Over the years, FA Solutions has been recognized by several organizations as an innovative and reliable software provider:





5. Glossary

In this final chapter, we summarise some key terms and abbreviations used in our industry.

FA Platform - SaaS cloud-based Portfolio Management System by FA Solutions

FA AppStore - app store for integrations which allows users to install new reports, processes, and components for everyday work in FA Platform

API - Application Programming Interface

AUM - Assets Under Management

CapEx - Capital Expenditure

CRM - Customer Relationship Management

DFM - Discretionary Fund Management

EOD price - End of Day stock price

FATCA/CRS - international tax reporting regulations

FIX messaging - Financial Information Exchange protocol-based messaging

GDPR - General Data Protection Regulation in the EU and the European Economic Area

IFA - Independent Financial Advisor

KYC - Know Your Customer

MiFID II - a legislative framework in the EU to regulate financial markets and improve protections for investors

NAV - Net Asset Value

NDA - Non-Disclosure Agreement

OpEx - Operational Expenditure

SaaS - Software as a Service

SLA - Service Level Agreement

SPOC - Single Person of Contact