



Brand Kit



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



1. Introduction to FA Solutions

1.1 Our mission & vision statements



WHY DISCOVERY



Our WHY
We believe superior technology enables quality wealth management services for everyone.

Our HOW
Transparency is integral to our solution. We make sure that everyone - from the end client to the back office - is on the same page by making the information they need accessible automatically, efficiently, and securely.
Personal, service-minded approach. We are a team of international professionals with diverse experience that support our clients in developing their business as they envisioned.
Find new ways to grow. We listen to the long-term needs of our customers and regulatory requirements to provide a service that grows with their business.

Our WHAT
FA Solutions provides a cloud-based portfolio management solution for wealth managers that automates and centralizes operational processes into one easy-to-use system.



FA SOLUTIONS BRAND SUMMARY

What does FA stand for?

- The story behind the name
FA = Financial Analysis → Financial Advice → Fintech Advantage
- Tagline
FA Solutions - Automate & Accelerate
Tomorrow's wealth management software solution, today.
Flexibility of a startup - stability of an established player.
- Vision statement
We believe modern technology enables everyone to have access to trustworthy and transparent wealth management services.
- Mission statement
Our mission is to improve the world of wealth management through simple automated technology.



1.2 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 and partners.

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.

1.3 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.

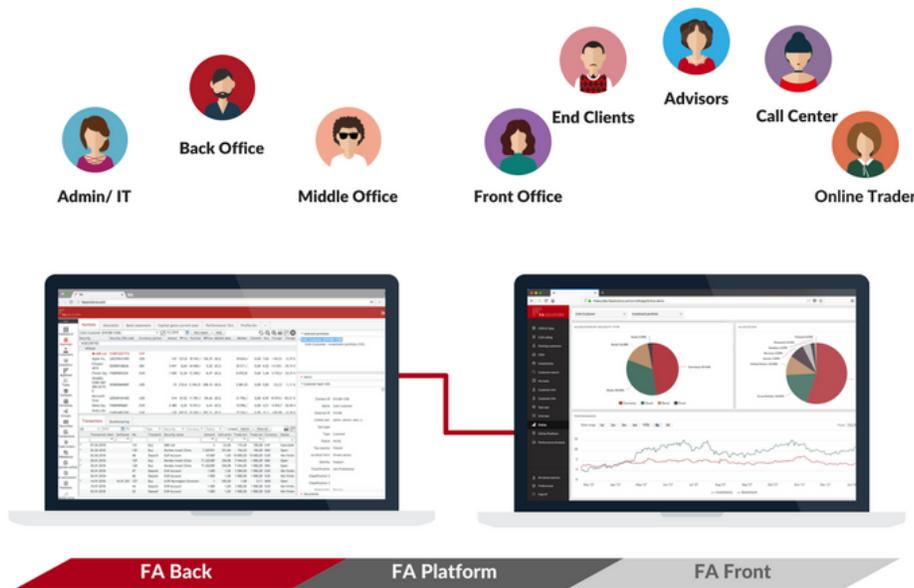


1.4 Our product and key product features

FA Solutions is a product company dedicated to offering superior Portfolio Management solution 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:





Everything in one platform

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

Just select the functions and features you need

All the modules are designed to work in a single platform, enabling you to avoid painful integrations and running multiple systems in-house.



Private Cloud Software-as-a-Service

Forget the IT hassle with our secure and carefree cloud-based Software-as-a-Service model. All you need is an internet browser.

No hard-coded configurations

Control your configurations, data, and users directly from the user interface. Efficient administration without programming skills.



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



1.5 The people behind our success



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

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.

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.



[Richard Nordin](#),

Managing Director at FA Solutions UK



[Robert Wennerström](#),

*Ex-Managing Director, currently
Partner & Chairman of the Board
at FA Solutions Sweden*

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. At the beginning of 2020, we also expanded the Management Team to include Johanna Bjenne - Senior FinTech Consultant with Fund Management expertise who was appointed as Managing Director of FA Sweden in January 2020.



[Johanna Bjenne](#),

Managing Director at FA Solutions Sweden



None of the growth and expansion experienced by FA Solutions in the recent years 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.

1.6 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.

1.7 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.

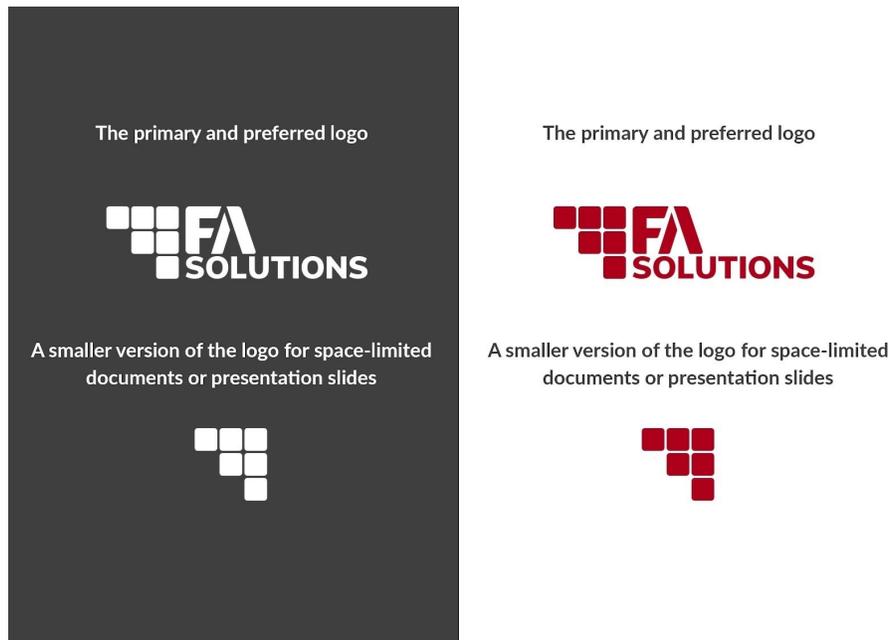
At the same time, FA has a lighter side as well. We always remain warm and approachable towards our audience, be they our clients, partners, prospects, or followers of our social media channels.



2. The visual identity of FA Solutions

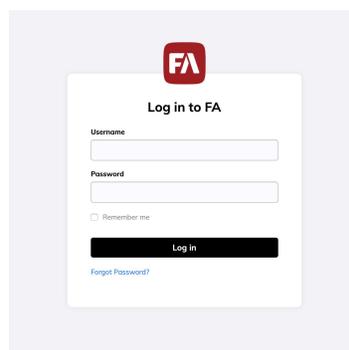
2.1 FA logo and how to use it

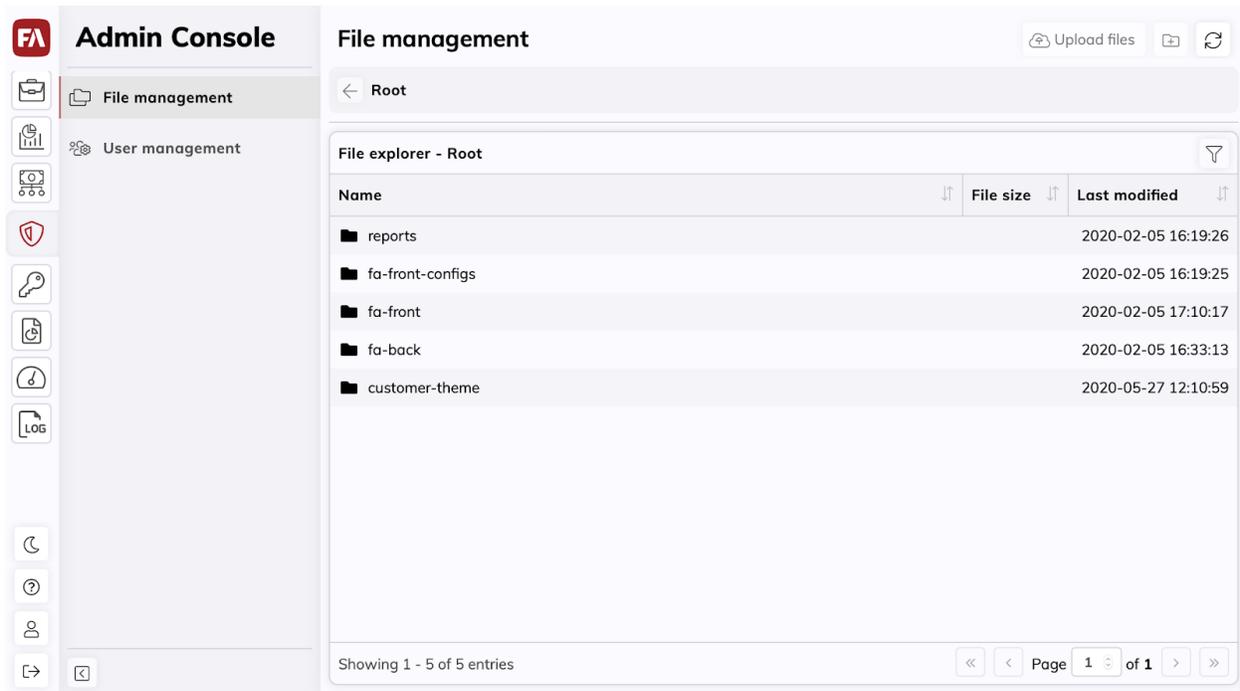
Below are versions of our logo for dark and light backgrounds. The original files for download can be found on our [media page](#) (Logos and photos section) or in the “FA Material Bank” shared Google Drive under the folder “Logos” in a .zip file called “New FA Logo 2020.”



2.1.1 Use of FA logo in the product

Inside FA Platform the version of the logo containing just “FA” is used in the top center for the login screen and in the top left for the product environment, as seen below:





2.1.2 Use of FA logo in marketing materials

On the marketing side in FA it is possible to use the full version of the logo (as shown on image 1 below), the version with only “FA” letters for product-related purposes (as shown on image 2 below), and the blocks-only version only if the full logo used too (as shown on image 3 below), and square “FA Solutions” icon for social media profile images and square canvas (as shown on image 4 below), depending on how much space is available for it and which looks the best in a given context.



Image 1 Full logo version



Image 2 Only FA logo version, mainly for product usage

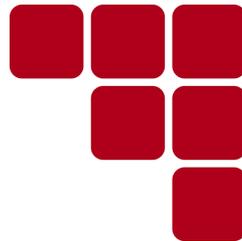


Image 3 Only blocks logo version. Can be used only if the full logo is mentioned too



Image 4 Square/icon logo. Shall be used in social-media and profile image with square canvas

The general guideline is that in any documents for external audiences (meaning outside of existing FA employees or clients), the full version of the logo as seen in image 1 above is preferred. The “FA” version from image 2 can be used when the material in question has too little space for the full logo. As for the blocks on image 3, the best use for them is as original design elements to be included in the top left corner on non-title pages of marketing materials. FA Solutions icon - image 4 - suits the best when the square canvas are used. This marks the document with the FA brand without drawing the attention away from the main content of the page, as seen in this Brand Kit.

Now, here are a few specific examples of FA logo use in marketing materials:



- For presentations, it is recommended to use the full logo in the top left corner on the title pages and the blocks-only logo in the same position for the subsequent pages, as seen in the “Updated Master” presentation file (= the template for any presentation in FA - internal or external) found in Google Drive in the “FA Material Bank” shared drive under “Presentations” folder.

01

FA SOLUTIONS AS A COMPANY

Confidential and Proprietary. Copyright (c) by FA Solutions Ltd. All Rights Reserved.

**A TRUSTED SOFTWARE PROVIDER
FOR THE FINANCIAL INDUSTRY**

One product platform
to cover your functions from
back to front office and all
the way to end clients.

Forget the IT hassle
with our secure
Software as a Service model.

**100% focus in
the financial industry**
now and in the future.
We know your business
and the best technical
solutions for it.

Confidential and Proprietary. Copyright (c) by FA Solutions Ltd. All Rights Reserved.

- For brochures, it is recommended to use the full logo in the top left corner on the title pages and the blocks-only logo in the same position for the subsequent pages, as seen



in the "FA brochure Jan 2020" file found in Google Drive in the "FA Material Bank" shared drive.



FA PLATFORM FOR BACK OFFICE

We enable our clients to automate recurring manual tasks by providing a scalable, flexible, state-of-the-art functionality, and processes. With the help of our task and workflow management our clients avoid irrational operational work and overhead. We simply deliver more room for your growth.

Our clients get more out of your business; they have the control of cash amount by optimising asset allocation, streamlining your settlement process, simplify the pre-trade process, and we offer efficient transaction or position based investment according. All in a single platform from front office to back office. We give our clients more time to spend with their clients.

- ✓ **COMPLIANCE - REGULATORY**
Compliance - Regulatory provides you with tools for regulatory reporting, such as MIFID II and GDPR, and supports monitoring of both external and internal requirements from company-level rules to portfolio-specific restrictions.
- ✓ **TRADE ORDER MANAGEMENT**
Trade Order Management module enables you to manage an entire life cycle of a trade in an integrated, compliant, and transparent way.
- ✓ **CORPORATE ACTIONS**
Corporate Actions module allows you to control which portfolios to use, which transactions to create, which taxes to apply, and when to exercise the corporate action. Posting, executing, and distributing to thousands of portfolios with one click.
- ✓ **FEE MANAGEMENT**
Fee Management module allows you to automatically and accurately perform calculations from simple asset management fees to complicated performance fees with High-Water Marks.
- ✓ **REPORTING**
The FA Platform includes a vast variety of standard reports and any kind of custom reports can be easily built on request. Diverse report parameters allow light to be shed on hidden details.
- ✓ **FUND MANAGEMENT**
Fund Management everything including managing fund portfolios, calculating NAVs, maintaining shareholder registers, and regulatory reporting.
- ✓ **TRANSACTIONS**
Transaction types in FA are not pre-defined, but are configured based on your business needs. Users can add and configure transaction types without FA's assistance.
- ✓ **UNLIMITED ASSET TYPES**
In FA, asset classes and types are not pre-defined and are just a matter of configuration. You can have as many different asset types as you wish from traditional investment instruments, complex alternatives, to real estate.
- ✓ **INVESTMENT RESTRICTIONS**
In the current regulatory environment you need to ensure that your investments are compliant with all applicable laws, regulations, and other constraints. With FA's Compliance - Investment Restrictions you can integrate investment limits together with pre- and post-trade compliance seamlessly into your workflows.
- ✓ **PORTFOLIO AND MODEL PORTFOLIO MANAGEMENT**
Portfolio Management module simplifies the management of versatile transactions and multi-dimensional portfolio hierarchies. It adapts flexibly to the changing environment of your investment vehicles. Model Portfolio Management supports model portfolios, investment strategies, and client-specific preferences and enhances your discretionary asset management approach. FA's intelligent rebalancing logic allows you to efficiently apply your models to your portfolios.

- For event posters, blog post cover images, as well as any website material, it is recommended to use the full version of the logo unless other logo options make more sense and fit in better visually. For example:



FA SOLUTIONS INVITES YOU TO THEIR WEBINAR



Take full control of your investments

Wednesday, September 16th 2020 - 11:00 AM (EEST)

27	23	22	28
DAYS	HOURS	MINUTES	SECONDS

[Access webinar](#)

You're part of the team that created this webinar

- For press materials, external publicity documents, and on our website it is recommended to use the full version of the logo where appropriate in the publication.



FA SOLUTIONS

FEATURES PLANS ABOUT US BLOG INSIGHTS

Tomorrow's wealth management solution, today

[Get a free demo](#) [Download free guide](#)



2.1.3 Use of FA logo in official documentation

For the first page of official documents such as Product Offers, Partnership Agreements, etc., we shall use a full red logo (red color FA Solutions with blocks) in the top-left corner (as shown on the example images 4 and 6 below).

- Product offer



Image 4 FA Platform Offer, title page

For the consecutive pages it is advisable to use just the red FA blocks version to concentrate primarily on the document content, as shown on the image 5 below.



Image 5 FA Platform Offer, consecutive pages

- Partner agreement



Image 6 Partner Agreement, title page

- It is also advised to use the new FA logo (red color FA Solutions with blocks) in new Employment Contracts.

2.1.4 Other use cases

- Email signature example with blocks logo



The most suitable logo version for mugs & business cards would be the full FA logo with blocks. The color has to be chosen according to the background.



- Cups



- Business cards



- Other branded items

The rest of branded items which we are procuring and using both for clients and internally, such as pens, notebooks, umbrellas, chocolates, stickers, cardholders, etc. must have the most suitable logo version (either full FA logo or just blocks) and color.



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

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

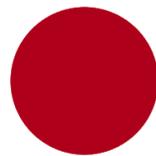
Below are the colors associated with FA Solutions. Our primary colors show what FA stands for:

- **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.

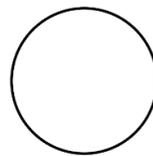
Primary Colors



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

All press releases are available through this link:

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

Title	Media	Release date
<u>Family offices - plug and play gives new opportunities</u>	Wealth Mosaic	6 Dec 2019
<u>Taaleri ja FA Solutions kumppanuuteen tavoitteena tuoda vaihtoehtoisia sijoitustuotteita piensijoittajille</u>	Kauppalehti	18 Mar 2020
<u>Taaleri and FA Solutions Partner to Grow Impact Investments</u>	NordSIP	1 Apr 2020
<u>Cloud Cover</u>	Global Finance Magazine	9 Apr 2020
<u>5 Things Every CEO Should Know About Navigating The World Of Finance</u>	Authority Magazine	12 Apr 2020
<u>"I have personally been close to burning out once." With Charlie Katz & Richard Nordin</u>	Thrive Global	16 Apr 2020
<u>Swiss Wealth Technology Landscape Report</u>	Wealth Mosaic	16 Apr 2020
<u>Automate to accelerate (direct link to our article in Swiss Report)</u>		1 May 2020
<u>How Digital Transformation is Democratising the Wealth Management Industry</u>	NordSIP	17 Apr 2020
<u>Luminor Partners to Consolidate Cross-Border Pension Mgt Operations in Baltics</u>	FinTech News Baltic	8 Jun 2020
<u>Luminor selects FA Solutions to consolidate cross-border pension management operations</u>	FinExtra	9 Jun 2020



<u>Luminor streamlines Baltic cross-border pensions business with FA Solutions</u>	Institutional Asset Manager	
<u>Baltics-based Luminor partners with FA Solutions to streamline cross-border pension operations</u>	European Pensions	
<u>Estonia's Luminor partners with FA Solutions</u>	Funds Europe	
<u>Luminor partners with FA Solutions to consolidate cross-border pension management operations in Estonia, Latvia, and Lithuania</u>	FinTech Finance	10 Jun 2020
<u>Baltic bank Luminor signs on FA Solutions to simplify cross-border ops</u>	FinTech Futures	
<u>5 Qs with Richard Nordin</u>	Wealth Mosaic	10 Jun 2020
<u>Jungiant pensijų fondų valdymo sistemas Lietuvoje, Latvijoje ir Estijoje, „Luminor“ bendradarbiaus su „FA Solutions“</u>	BNS Press Centre	
<u>Luminor teams up with FA Solutions</u>	The Paypers	11 Jun 2020
<u>Luminor to cooperate with FA Solutions by merging pension fund management systems in Lithuania, Latvia and Estonia</u>	Litas	
<u>Jungiant pensijų fondų valdymo sistemas Lietuvoje, Latvijoje ir Estijoje, „Luminor“ bendradarbiaus su „FA Solutions“</u>	Nuolaidu Bumas	
<u>How the Finance Industry Can Survive the Next Crisis</u>	Insights for Professionals	11 June 2020
<u>Soome idufirma FA Solutions aitab pensionihaldust lihtsustada</u>	FoundMe	15 June 2020
<u>FA Solutions: партнерство с Luminor Bank</u>	GoodNewsFromFinland	16 June 2020
<u>Things you need to know to succeed in the ever-changing</u>		29 June 2020



<u>world of finance</u>	Entrepreneur	
<u>50 Things You Need to Succeed in the Perpetually Changing World of Modern Finance</u>	Microsoft News	
<u>50 Things You Need to Succeed in the Perpetually Changing World of Modern Finance</u>	The World News	
<u>Luminor partners with FA Solutions to consolidate cross-border pension management operations in Estonia, Latvia, and Lithuania</u>	FinTech News	9 July 2020

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:

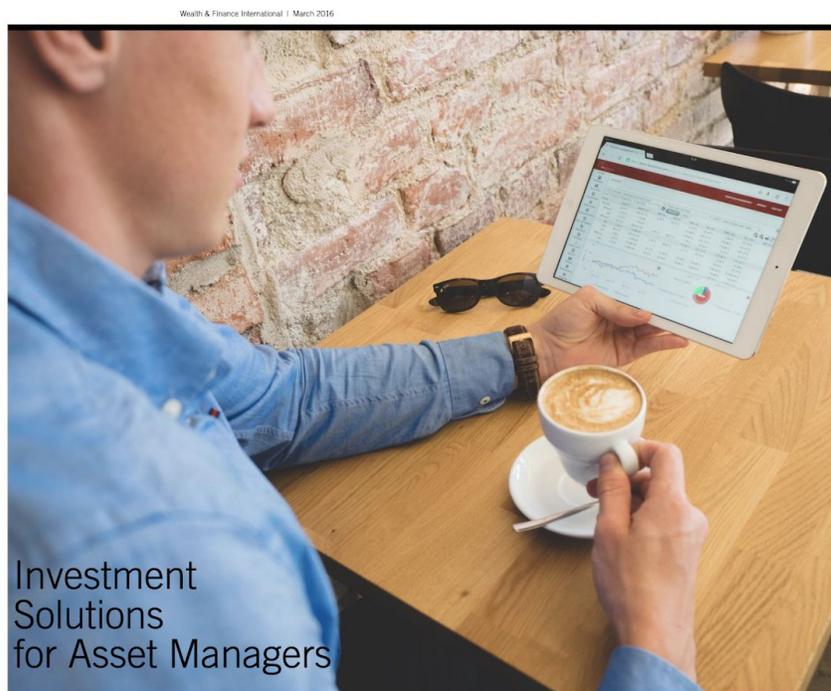
→ [Link to the full article](#)

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](#)



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@fasolutions.com
Web Address: www.fasolutions.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 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.



3.3 Our press contacts



Saara Vilokkinen

Product Marketing Manager

+358 40 705 6951

saara(a)fasolutions.com

[Connect with Saara](#)



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:

“FA Solutions’ cloud-based platform provides a single technical solution commonly managed across several locations, allowing us to focus on providing the best service for our customers. By working closely with FA’s team, we were able to create customized operations and functionalities to fit our needs due to the flexibility of their platform and their willingness to listen and understand our pain points.”

– Rasmus Pikkani, Head of Asset Management and Pensions at Luminor Bank

“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:



Ekaterina Iarygina

Marketing & Partnerships Manager

+358 40 675 4661

[ekaterina\(a\)fasolutions.com](mailto:ekaterina(a)fasolutions.com)

[Connect with Ekaterina](#)

4.3 Our awards

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





is a **WealthTech 100** company



WEALTHTECH100
2019

The world's most innovative
WealthTech companies

www.WealthTech100.com

wealth:finance2017

onestowatchin
Software Solutions

Most Innovative
Software Solutions Provider

FA Solutions
Northern Europe



THE
10 \$

MOST TRUSTED
Asset & Wealth
MANAGEMENT
SOLUTION PROVIDERS 2017



This company has the lowest Credit Risk in the Dun & Bradstreet Credit Risk Classification.

dun & bradstreet 2019 **Bisnode**
WORLDWIDE NETWORK



This company has the lowest Credit Risk in the Dun & Bradstreet Credit Risk Classification.

dun & bradstreet 2018 **Bisnode**
WORLDWIDE NETWORK



This company has the lowest Credit Risk in the Dun & Bradstreet Credit Risk Classification.

dun & bradstreet 2017 **Bisnode**
WORLDWIDE NETWORK



This company has the lowest Credit Risk in the Dun & Bradstreet Credit Risk Classification.

dun & bradstreet 2016 **Bisnode**
WORLDWIDE NETWORK



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