AI in Wealth Management

What are the Benefits for Women?

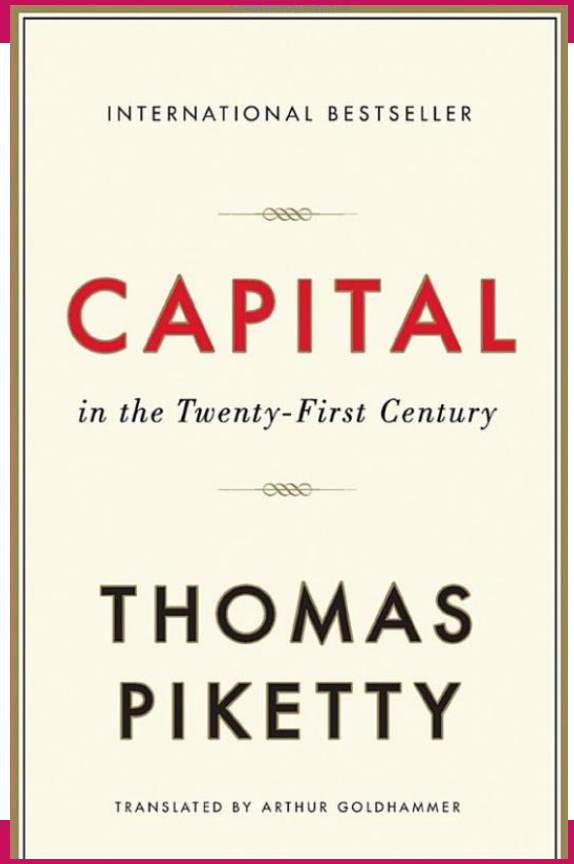
Female Business Angel Club

AI Wealth Management

- Are you fed up with zero interest rates?
  - Inflation eats up nominal interest
  - Economic Growth Model is twisted towards shares

- Therefore women need a second income to close the female wealth gap

Many women are good savers, but not investors



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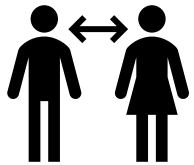
An unconvenient truth

Only **3%** of the population have access to professional wealth management

97% *Do it yourself – Investment (Swissquote, True Wealth), or so-called wealth advisory (One size fits all)*

Sorrows

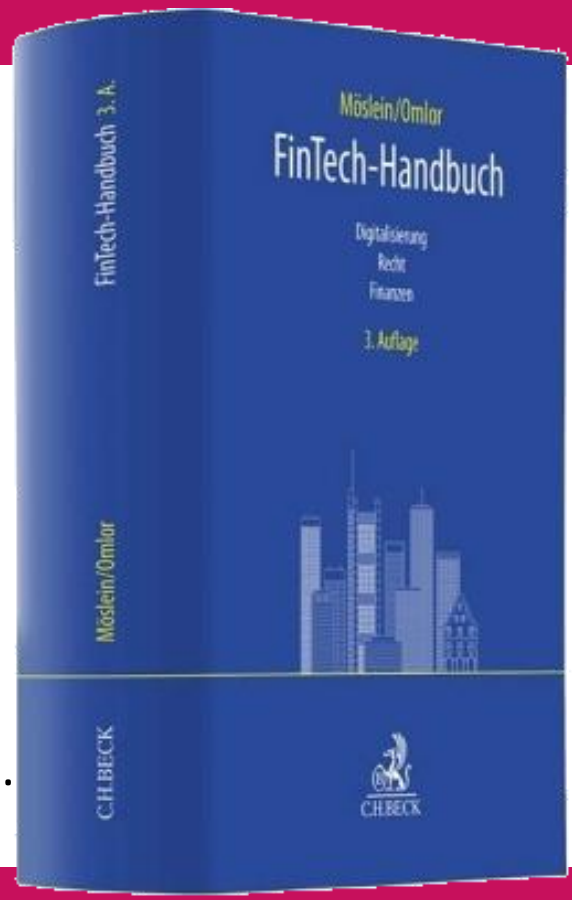


Distrust

Lack of knowledge

No Time

- Wealth management provides a systematic strategy to create and augment wealth including all processes and procedures like portfolio engineering, asset allocation, risk management, financial planning and personalization
- AI wealth management used Artificial Intelligence, Algorithms, Big Data and Machine Learning (in some cases even Deep Learning (AISOT)) to achieve these goals
- The AI Algorithm is not subject to emotions and behavioral biases (like FOMO).
- Every investor has unique financial goals, risk tolerance, and preferences. AI algorithms can analyze individual preferences and tailor to those needs.



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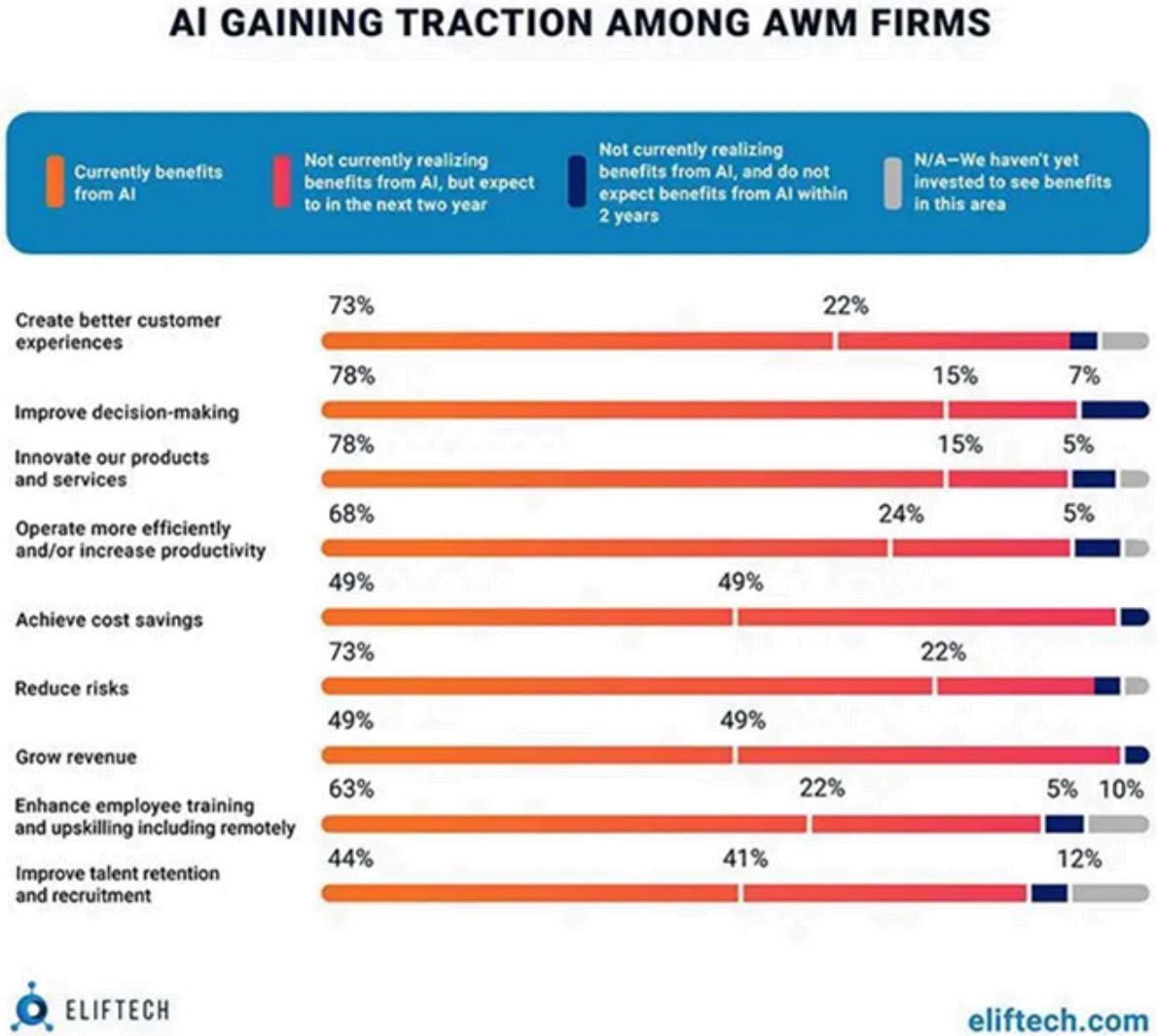
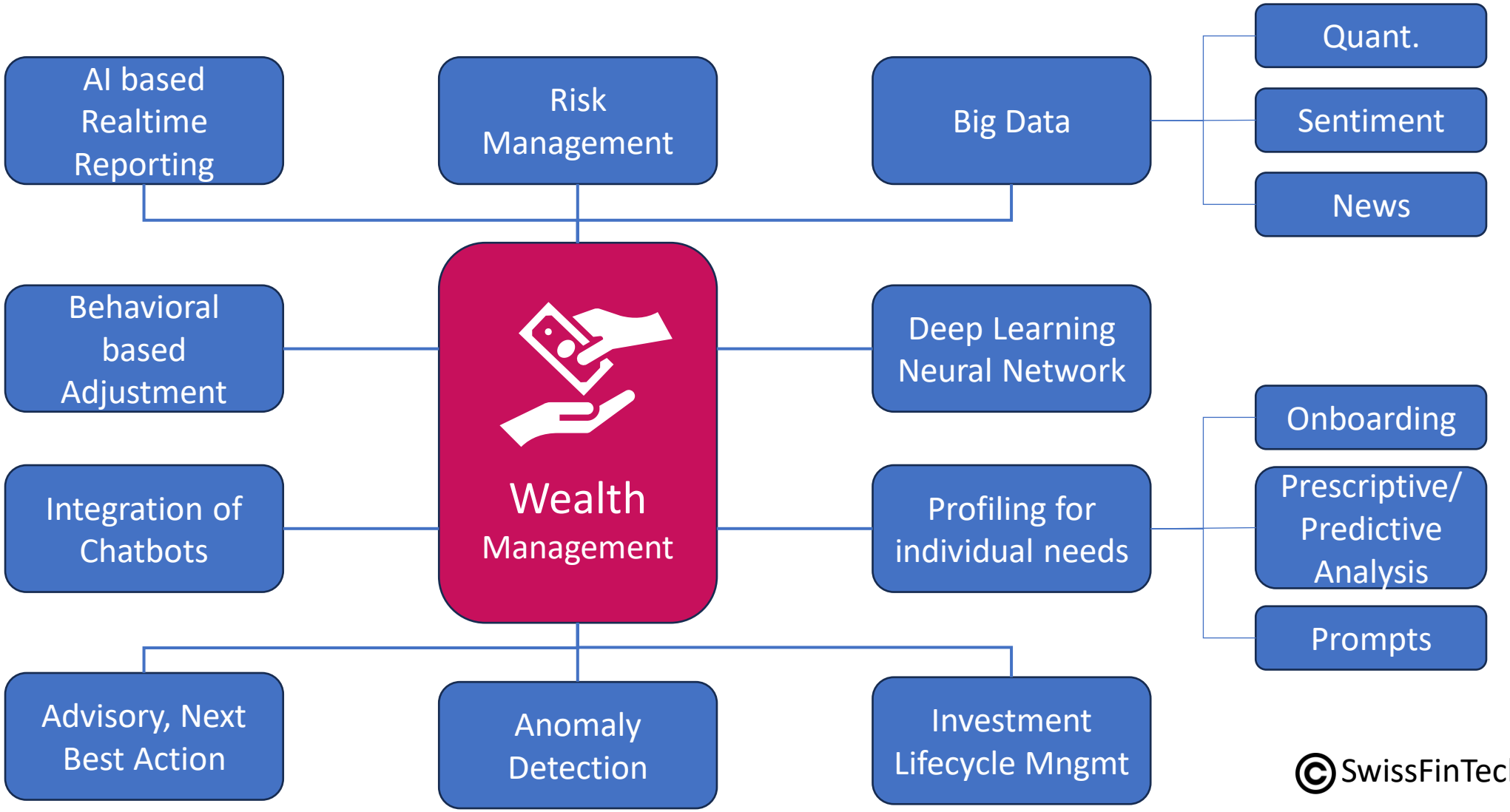
ELIFTECH Research shows, that banks are already using AIs in wealth management

Main Benefits:

- ➢ Better customer experience
- ➢ Better decision making
- ➢ Innovates products and services
- ➢ Reduces risks
- ➢ Achieve cost savings
- → Democratization and Individualization of Wealth Management
- → Realtime reporting and dynamic adjustment strategies without prohibitive transaction costs



Integrated personalized investment approach



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Cooperation SFTL Business Angels & Colivar

EINE PUBLIKATION VON SMART MEDIA

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Pioneering the Closure of the Wealth Gap for Women Through Innovation and AI

Closing the Female Wealth Gap through Joining the SwissFinTechLadies Female Angel Club and the Use of AI Solutions
The SwissFinTechLadies Female Angel Club is dedicated to narrowing the female wealth and entrepreneurship gaps. Despite considerable progress in the workplace, women remain underrepresented as investors. The reality is unavoidable: if they're not investing directly, their money in the bank is being invested by others on their behalf. Investing goes beyond mere saving, yet many women, despite saving, lack an investment account. Alarmingly, over 70 percent of women do not have a secondary income from investments. The challenges of time management for working mothers and female executives, combined with perceived complexities in investing, often deter women's participation. The disparity is most striking in the digital assets sector, where women hold a mere 1 percent of assets.

Financial Empowerment for Women
The SwissFinTechLadies Female Business Angel Club aims to change this narrative. With a diverse membership ranging from female asset managers and family offices to novices embarking on financial literacy or angel investment training, the club ensures that members can always seek advice from more experienced women in the financial sector. This initiative is particularly appealing to women interested in sustainable investment opportunities. The club fosters an environment where experienced investors can mentor beginners, emphasizing sustainability, family-oriented investments, and long-term planning. This diverse investment community enhances the value of the angel network, promoting unity and strength in pursuing financial empowerment. The critical takeaway is the necessity for women to invest to prevent further widening of the wealth gap, focusing on longevity, family, and global betterment. If they haven't started investing, they can join the club by scanning the QR code at the article's end.

Starting Points for Investment
While the SwissFinTechLadies Angel Club does not offer investment advice, it emphasizes the importance of consulting trusted FINMA-licensed partners and participating in financial literacy programs. The club advocate for a structured approach to investment, free from personal biases, facilitated by AI to provide tailored solutions for women at all stages of financial literacy. SwissFinTechLadies has partnered with professional advisors, including Colivar,Gestion AG to support this mission.

Alarmingly, over 70 percent of women do not have a secondary income from investments.

Colivar: Pioneering Wealth Management Tailored for Women
In the evolving financial services landscape, Colivar stands out with its revolutionary, women-centric approach to wealth management. Supported by Colivar Gestion AG, this platform champions financial equity and personalized investment strategies. Utilizing advanced AI, Colivar creates dynamic, customized investment plans that adapt to life changes, ensuring a holistic approach that balances financial goals with personal aspirations.

Empowering Financial Journeys with Cutting-Edge Technology
Utilizing advanced AI, Colivar crafts dynamic, bespoke investment plans. This innovation ensures strategies adapt seamlessly to life's changes, embodying a holistic approach to wealth management that values personal aspirations alongside financial goals.

Trust, Expertise, and a Holistic Vision
Regulated by FINMA, Colivar merges trust with unparalleled market acumen. Its hybrid model combines the precision of technology with human insight, delivering wealth management solutions that are both effective and empathetic.

A Commitment to Inclusive Growth
Colivar transcends traditional wealth management, positioning itself as a steadfast ally in women's financial empowerment. This partnership signifies a movement toward an inclusive financial future, inviting investors on a journey of growth, independence, and personalized care that redefines wealth management standards. Interested women can join the beta community and be part of this financial revolution by signing up at the *www.colivar.ai* website.

SFTL Business Angels Club

COLIVAR

Enjoy and experiment with Colivar's wealth management app now!

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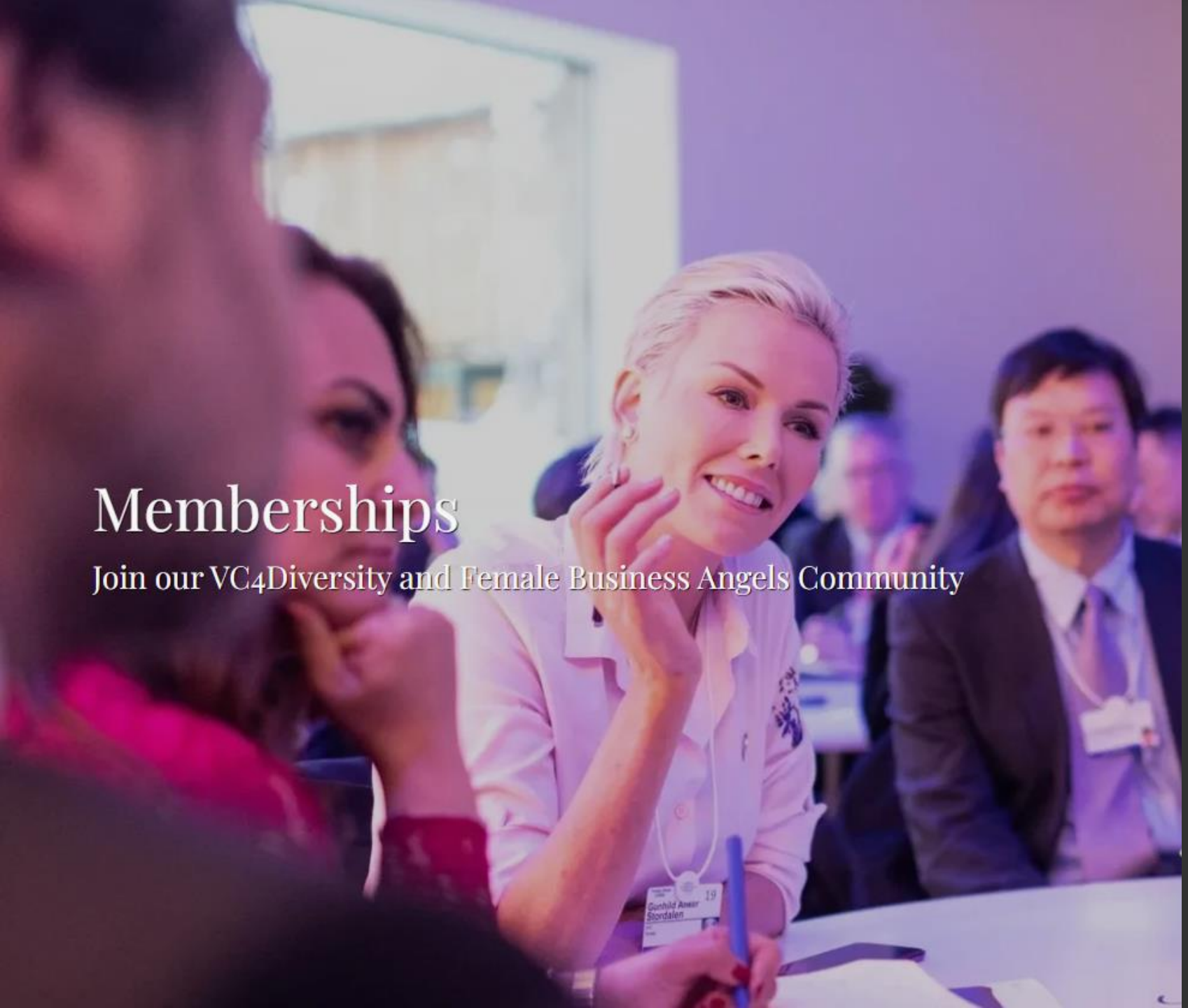

Memberships

Join our VC4Diversity and Female Business Angels Community

Female Business Angels

Get your say in FinTech: Invest with small tickets using Swiss Partnerships

CHF 199

No woman can do it alone. But we can collaborate, discuss exchange and invest together through Swiss Partnerships

We believe investment networks and clubs are the future of investing. You can share insights with other women business angels and VC members, support our goal of increasing female participation through shareholdings and get smaller investment tickets

- Find opportunities before they become public on our website and meet amazing startups, venture capital firms and likeminded investors
- We also care about impact investing and diversity

For further benefits, see the perks below

Please interact with us on your business ideas.

Our trainings are free for members and include trainings on financial literacy, impact, diversity and venture capital.

Contact us

Dr. Karen Wendt
Email:
karen@swissfintechladies.ch

LinkedIn:
https://www.linkedin.com/in/profkarenwendt

Dr. Mahnoosh Mirghaemi
Email:
mm@colivar.ch

LinkedIn:
https://www.linkedin.com/in/mahnoosh-mirghaemi/