



9. INVESTMENT FORUM Frankfurt

Eine gemeinsame
Veranstaltung von

2. Juli 2014

Nicolai Schödl Business Consulting
Strategie / Prozesse / Finance / IT

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 **KONSORT**

Dialog



Vanessa Grüneklee
Head of European Client Operations

Agenda

- Wie hat alles angefangen?
- Was waren und sind AXA IM Ziele?
- Das HUB
- Wichtige Punkte

AXA IM Erkenntnisse

- Kunden sind unterschiedlich
- Nicht jeder hat dieselbe Grösse
- Kunden erwarten, dass der Asset Manager Flexibilität zeigt und nicht umgekehrt
- Man sollte versuchen, ein NEIN als Antwort zu vermeiden - soweit es geht
- Zeit kostet - deswegen sollte alles so einfach wie möglich sein

Was wollen wir erreichen?

- **Kunden**-bedürfnisse befriedigen
- **Kunden** flexible Optionen anbieten
- **Kunden** das Leben erleichtern
- Die STP-Raten der **Kunden** erhöhen
- Die Risiken von **Kunden**, AXA IM & Partnern wo immer möglich verringern
- Die Exaktheit unserer **Kunden** Daten erhöhen
- Effizienter Rebateprozess um die **Kunden**-zufriedenheit zu erhöhen

Wie wollen wir es erreichen?

- AXA IM hat sich für ein “long term operating Model” entschieden



Europäische
Distributoren



Ein Kontakt für alle

Asiatische
Distributoren



Standard
Depoteröffnungsunterlagen

AXA IM

BPSS
Luxembourg

BPSS
Hong Kong

IFDS UK

SSB Lux

SSB Dublin

BP2S Paris

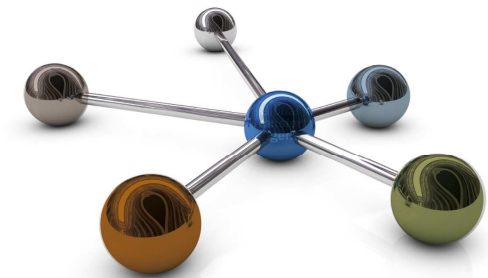
SSB Germany

SSB Zurich



Ein überregionales Angebot

- **ONE** Ein kostenloses Konto für alle AXA IM Fonds
- **ONE** Eine Lösung für die Investition in Französische & andere lokale Fonds OHNE Umwege
- **ONE** Ein Antragsformular & einmalige Bereitstellung der KYC/ALM Dokumente
- **ONE** Ein Zugang für alle Orders, d.h. nur eine Swift-Adresse bzw. Faxnummer
- **ONE** Eine einmalige Bereitstellung der Bankdaten
- **ONE** Ein Reporting-Standard
- **ONE** Ein Kontakt für alle operativen Fragestellungen



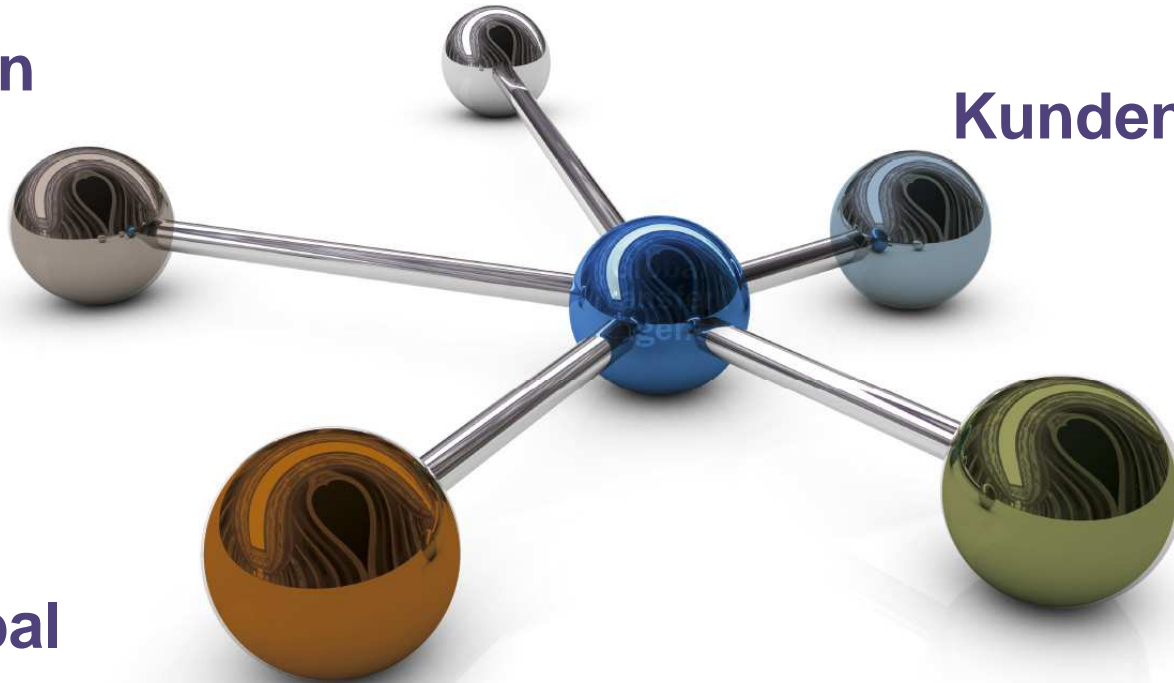
Innovativ

Modern

Kundenorientiert

Flexibel

Global



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