

Userlane and fincite join forces to create an intuitive wealth management experience

The partnership aims to provide financial institutions and their clients with a seamless digital investment experience.

MUNICH, GERMANY, January 9, 2025 /EINPresswire.com/ -- Userlane, a leading [Digital Adoption Platform](#), and fincite, one of Germany's fastest-growing WealthTech companies, have announced a strategic partnership. This collaboration aims to optimize the use of the fincite • cios platform, providing financial institutions and their clients with a seamless digital investment experience.



Our mission is to make software intuitive and accessible. Together with fincite, we're creating an innovative, user-friendly wealth management experience."

*Hartmut Hahn, CEO of
Userlane*

The modular [fincite • cios software suite](#) enables banks and asset managers to fully digitalize their wealth management services across the entire value chain. All processes are seamlessly integrated – from client onboarding and (hybrid) advisory to order execution and

investment reporting. Thus, financial institutions can efficiently digitalize their wealth management end-to-end (E2E), unlock new revenue opportunities, and better support their clients in reaching their financial goals.

Userlane leverages its digital adoption expertise to enhance the user acceptance of fincite's software and enable advisors to work more efficiently. Through this new partnership, Userlane and fincite will jointly drive the adoption of WealthTech software:

- Userlane ensures efficient onboarding of wealth management advisors to fincite • cios, enabling them to better advise clients with a deep understanding of the platform's features.
- Userlane supports clients in implementing fincite • cios, optimizing financial management processes, and enhancing user satisfaction.
- Userlane helps fincite's clients unlock the full potential of fincite • cios through interactive in-app guidance.

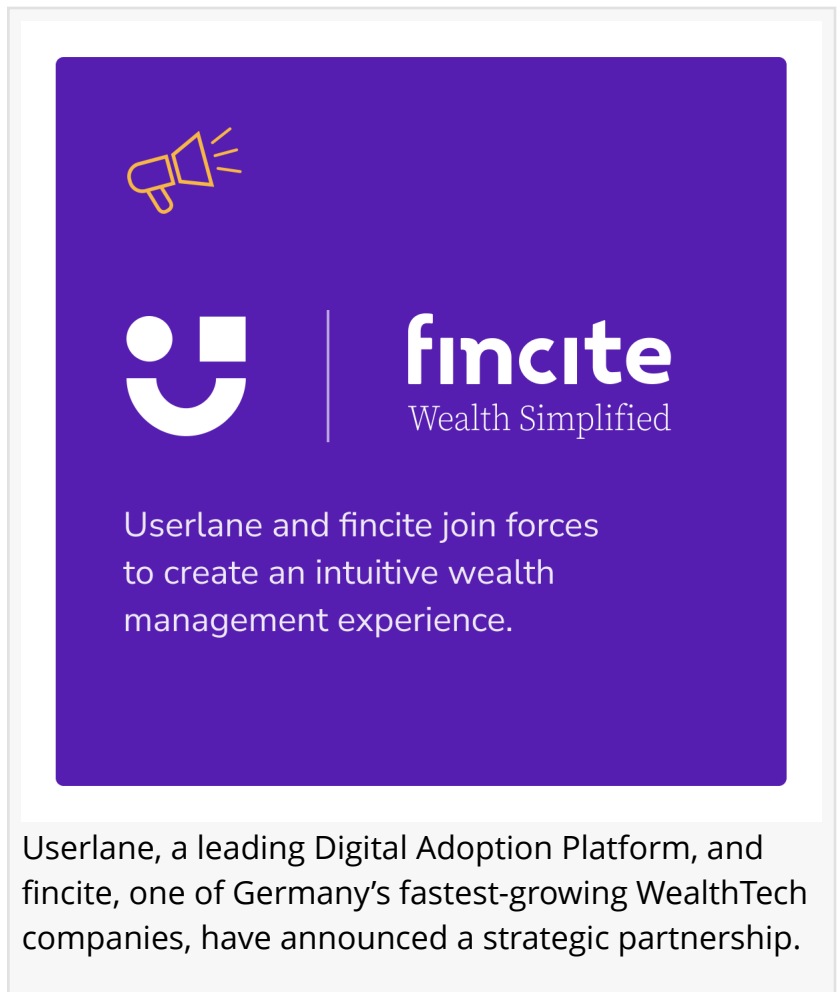
Marco Schüller, Lead Financial Advisory & Family Office at fincite, shared: “Our partnership with Userlane has a clear goal: to help fincite • cios users unlock the software’s full potential. Real-time guidance makes using the platform easier and more intuitive for advisors and their clients. The result? A seamless digital investment experience that takes efficiency and usability to a new level.”

The partnership between Userlane and fincite ensures [technology is used effectively](#) to support advisors and their clients. It simplifies software use, enhancing the user experience and boosting productivity.

“Our mission is to make software intuitive and accessible. Partnering with fincite allows us to help advisors and their clients better understand and optimize wealth management processes. Together, we’re creating an innovative, user-friendly wealth management experience,” said Hartmut Hahn, CEO of Userlane.

This partnership highlights the shared vision of both companies to drive digital transformation in financial services and help financial institutions make their services more client-centric and efficient.

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