

## SIMPLE SET-UP

# What are the next steps?

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### Pre-stage

Demo account  
with demo users

NO COST

1

### Initial Setup (1-2 weeks)

1. White-labeling with url [YourWebsite.e-finance.app](http://YourWebsite.e-finance.app)
2. Set-up of investment strategy and investment products
3. Control of historical data and risk calculations
4. Investigation of platform integration needs

NO COST

2

### Trial Phase (1-3 months)

1. Contract signing (with possibility to cancel without cost)
2. Custody bank integration of real client portfolios
3. Education and initial platform support

SUBJ. TO FEE

3

### Live Setting (>>)

1. Integrating accounts and taking all customers live
2. Investment strategy and products updates
3. Platform and service support