



WINVEST ASSET MANAGEMENT × WealthArc:

Turning complex data into a growth engine



Stefan Rammelmeyer
CEO of WINVEST ASSET MANAGEMENT



The Client

WINVEST ASSET MANAGEMENT is an independent wealth manager based in Switzerland overseeing more than CHF 400 million in assets across 12 custodian banks. Since working with WealthArc in 2018, WINVEST ASSET MANAGEMENT has streamlined its operations, strengthened data reliability, and enhanced compliance efficiency.

The Challenge

Before implementing WealthArc, WINVEST ASSET MANAGEMENT's on-premise portfolio management system was holding the firm back. Daily reconciliations took up to an hour, performance checks were manual, and data lived in silos across multiple custodians besides heavy maintenance burdens.



The pain points were clearly visible:

**Manual processes:**

Daily reconciliations and performance calculations were time-consuming and error-prone.

**Limited scalability:**

The old system restricted the number of connected banks to just three, hindering growth.

**Maintenance burden:**

Frequent manual updates and on-premise upkeep created unnecessary workload.

on-premise system

manual processes
scalability limits
maintenance burden

operational slowdown

WINVEST ASSET MANAGEMENT needed a cloud-based platform that could unify data, reduce friction, and deliver reliable, timely insights.





The Opportunity

To replace manual processes and legacy systems with automation and establish a single, trusted source of data that could scale effortlessly with the firm's growth while meeting regulatory standards and supporting future innovation.

WINVEST ASSET MANAGEMENT's vision was simple: a modern digital infrastructure capable of powering efficient portfolio management, regulatory precision, and client confidence.

The Solution

WealthArc implemented a unified cloud native platform connecting all 12 custodian banks through automated reconciliation and data-quality workflows. What began as a simple integration has evolved into WINVEST ASSET MANAGEMENT's operational backbone that is used daily across investment, trading, and compliance teams.



“WealthArc gives us the confidence that our data is reliable, our workflows are efficient, and our compliance is rock solid.”

Stefan Rammelmeyer, CEO of WINVEST ASSET MANAGEMENT

Core features include:

Portfolio Management

All investment management and analysis handled directly in WealthArc.

Trading & Compliance

Customised pre- and post-trade checks integrated into workflows.

Fee Management

Transparent, quarterly fee calculations with reliable audit trails.

Client Management

Expanding use of WealthArc's CRM to support new fund launches, product distribution and fund oversight.

Dashboards & Analytics

MIS dashboards and maturity tracking enable proactive performance monitoring.



In particular, Stefan highlights WealthArc's collaborative approach as a key factor for their long-term partnership.

“ WealthArc has always been open to listening to our needs. The personal engagement of their experts makes a real difference. ”

Stefan Rammelmeyer, CEO of WINVEST ASSET MANAGEMENT



The Outcomes: Speed, reliability, and scale

With automation and structured data, WINVEST ASSET MANAGEMENT has achieved measurable efficiency and operational clarity:

Time savings

Up to 1 hour saved daily on data consolidation; portfolio management processes reduced from 4 hours to 30 minutes.

Improved reliability

Consistent, high-quality data across all custodians.

Enhanced transparency

Clients can view consolidated holdings across banks, strengthening trust and engagement.

Reduced manual work

Most processes are now digital, improving accuracy and compliance.

Strategic Value

Through automation, transparency, and collaboration, WealthArc has helped WINVEST ASSET MANAGEMENT transform its operations from manual processes to an efficient, data-driven wealth management environment. With continued product innovation and a strong partnership, WINVEST ASSET MANAGEMENT is well-positioned to serve its clients more effectively and stay ahead in a rapidly evolving industry.

“ Scalability and efficiency were decisive for us. WealthArc allows us to grow without adding administrative complexity, and its simple pricing model makes planning easier. ”

Stefan Rammelmeyer, CEO of WINVEST ASSET MANAGEMENT



WealthArc has become more than software. It's the trusted engine powering WINVEST ASSET MANAGEMENT's growth, efficiency, and client confidence.

Beyond operational efficiency, WealthArc also supports WINVEST ASSET MANAGEMENT's FINMA compliance reporting, concentration-risk documentation, and ongoing regulatory submissions, giving the firm a data foundation built for both performance and governance.

Looking Ahead

As the wealth management industry continues to evolve, WINVEST ASSET MANAGEMENT and WealthArc share a common vision: harnessing automation and intelligent data to redefine how portfolio, compliance, and client management come together.

The next phase of collaboration is focused on deeper automation in regulatory workflows, smarter analytics, and seamless integration across the investment lifecycle. By connecting operational, compliance, and client data in one ecosystem, WINVEST ASSET MANAGEMENT aims to further reduce manual touchpoints, anticipate regulatory needs, and strengthen its ability to scale without added complexity.

For WINVEST ASSET MANAGEMENT, this isn't just about technology, it's about future-proofing the business. Reliable, AI-ready data and automated governance will shape how independent wealth managers compete and grow in a more transparent, data-driven industry.

“ We are excited about WealthArc's roadmap and their willingness to evolve their services with their clients' needs in mind. ”

Stefan Rammelmeyer, CEO of WINVEST ASSET MANAGEMENT



Why WealthArc



Broad custodian connectivity

150+ integrations enabling seamless consolidation across Swiss and international banks.



Trusted data foundation

Automated reconciliation ensuring accuracy, transparency, and audit-ready data.



Efficiency at scale

Enables growth without additional administrative burden.

About WealthArc

WealthArc is a global data infrastructure company delivering high-quality, AI-ready portfolio data at scale to wealth and asset management.



Simon Kaufmann
Managing Director of WealthArc

“ Our goal with WealthArc is to give independent asset managers like WINVEST ASSET MANAGEMENT a platform they can trust as they scale - one that turns complex, fragmented data into a reliable source for growth and client confidence. ”



WealthArc Data Box

WealthArc Data Box is a next-generation global data feed grid that connects you to your most important custodians and data sources, automatically aggregating your investment data, cleaning, reconciling, and validating it through an advanced API framework to ensure the highest quality. The result is trusted data delivered seamlessly to your AI systems and any wealth-tech or fintech applications, giving you access to reliable portfolio data worldwide and empowering you to make wiser, faster, and better decisions.

WealthArc PMS

WealthArc PMS is an intuitive portfolio management application that enables wealth managers, asset managers, and family offices to manage their wealth, reduce costs, and streamline all processes — from front to back office — within one centralized, cloud-native, and user-friendly platform.



www.wealtharc.com



Get in touch with our Team!

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