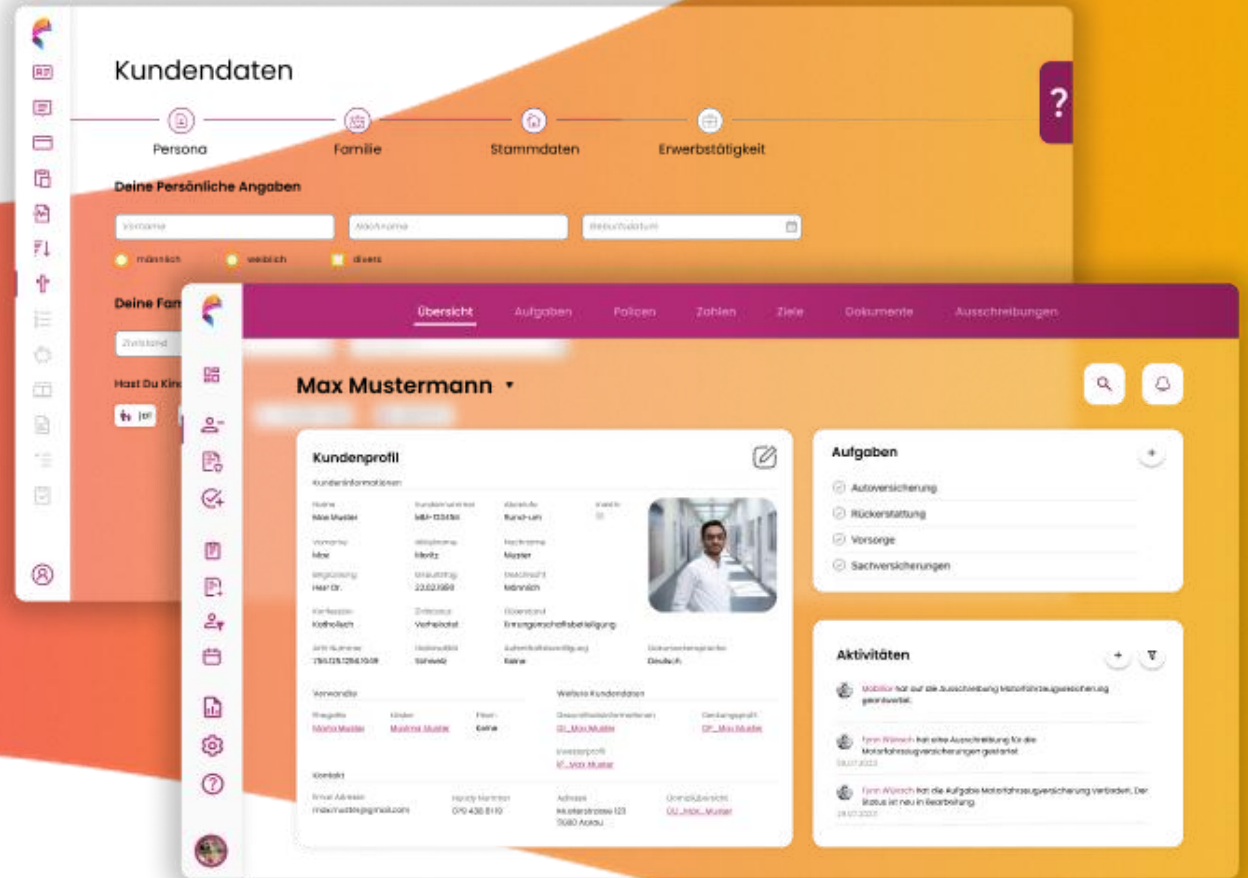




Bessere Admin – Mehr Beratung

**Einfach.
Effizient.
Digital.**



Finly – das Taschenmesser für Finanzdienstleister.

Analysetool

CRM

Dokumentenablage

Aufgabenmanagement

Policenmanagement

Abrechnungsmanagement

Signaturen

Vorlagen

60+

Funktionen

Was macht Finly **speziell**?



Analysetool

Anpassungen

Vorlagen

Signaturen

The screenshot displays the Finly application interface with several key components:

- ERBSCHAFT REGELN (Estate Rules):** A form for defining inheritance rules, including fields for "Bezeichnung" (designation), "Datum" (date), and "Wessen Ziel ist es?" (whose goal is it?).
- Deine Persönliche Angaben (Your Personal Information):** A form for entering personal details like "Vorname" (first name), "Nachname" (last name), and "Geschlecht" (gender).
- Deine Familie (Your Family):** A section for family-related information, including "Zivilstand" (marital status) and "Heiratsdatum" (wedding date).
- Hast Du Kinder? (Do you have children?):** A section for child-related information, including "ja" (yes), "nein" (no), "auf dem weg" (on the way), and "geplant" (planned).
- Hausratversicherung (Home Contents Insurance):** A detailed view of insurance coverage, including "Status", "Personalisierung" (personalization), and "Vergleichbar machen" (make comparable). It lists "Deine Deckungsbausteine" (your coverage components) like Feuer (fire) and Glasbruch (glass breakage), and "Weitere Deckungsbausteine" (further coverage components) like Reisegepäck (travel luggage) and Kreditkartenmissbrauch (credit card misuse).
- Wunschwert (Desired Value):** A section for setting financial goals, including "Lohnjahr" (salary year), "1 Jahr", "720 Tage", and "bis zur Pension" (until pension).
- Bestehende Deckung (Existing Coverage):** A section for reviewing current coverage, including "Wunschwert" (desired value), "80%", and "Prüfung" (review).
- Deckungsbedarf (Coverage Requirement):** A section for determining coverage needs, including "kurzfristig" (short-term) and "langfristig" (long-term).
- IN FOLGE KRANKHEIT (As a result of illness):** A section for reviewing coverage requirements in the event of illness.
- IN FOLGE UNFALL (As a result of accident):** A section for reviewing coverage requirements in the event of an accident.

Was macht Finly **speziell**?

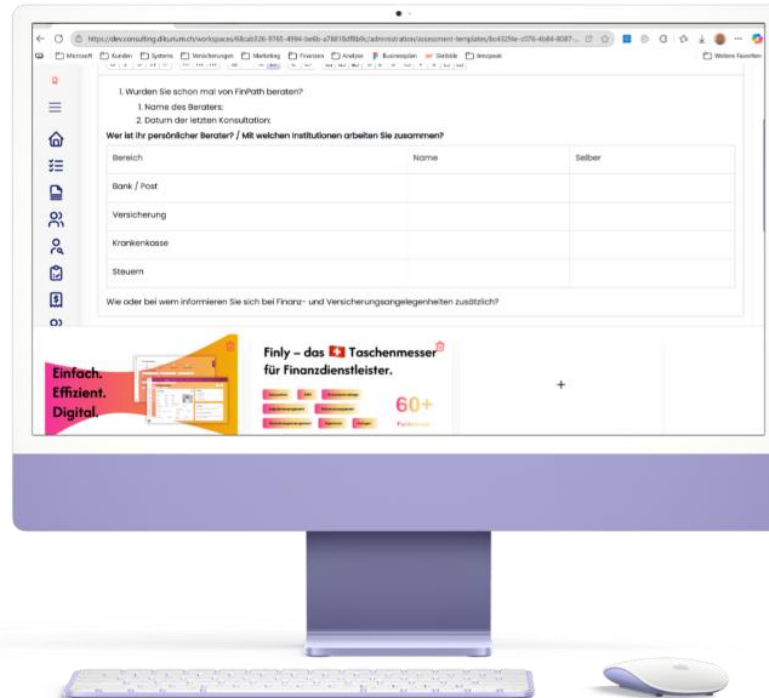


Analysetool

Anpassungen

Vorlagen

Signaturen



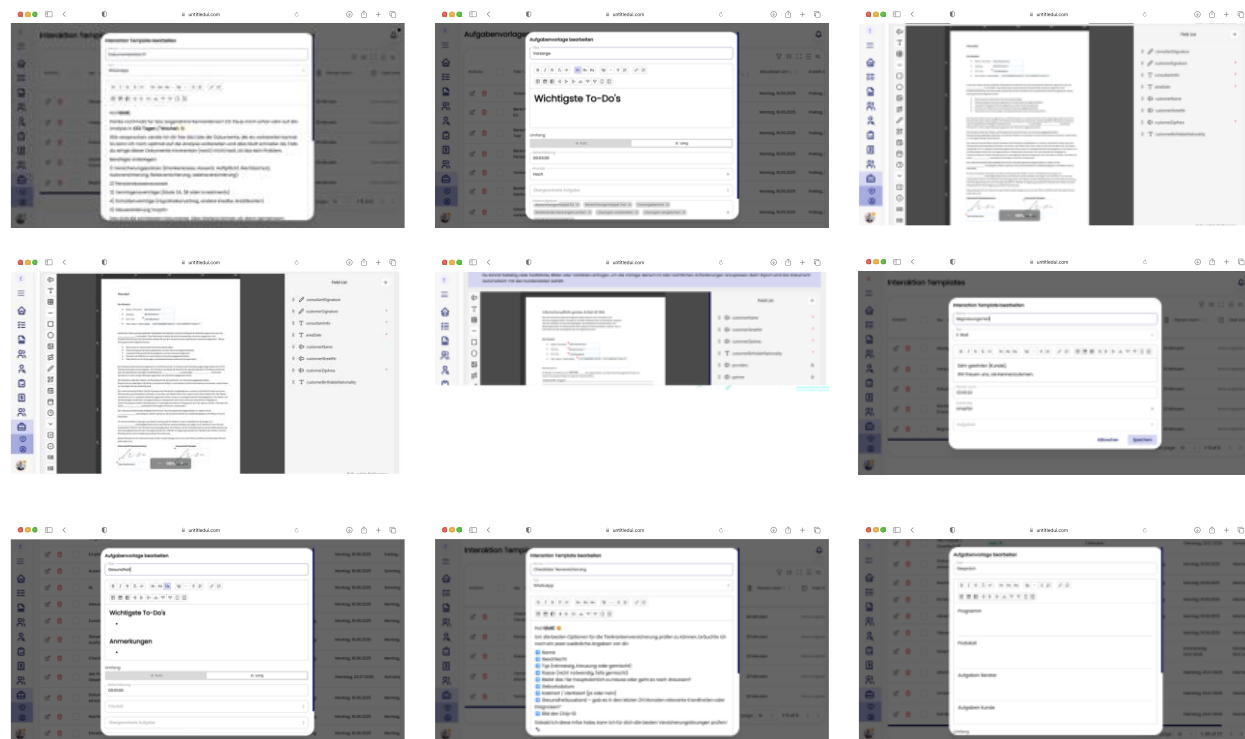
Was macht Finly **speziell**?

Analysetool

Anpassungen

Vorlagen

Signaturen



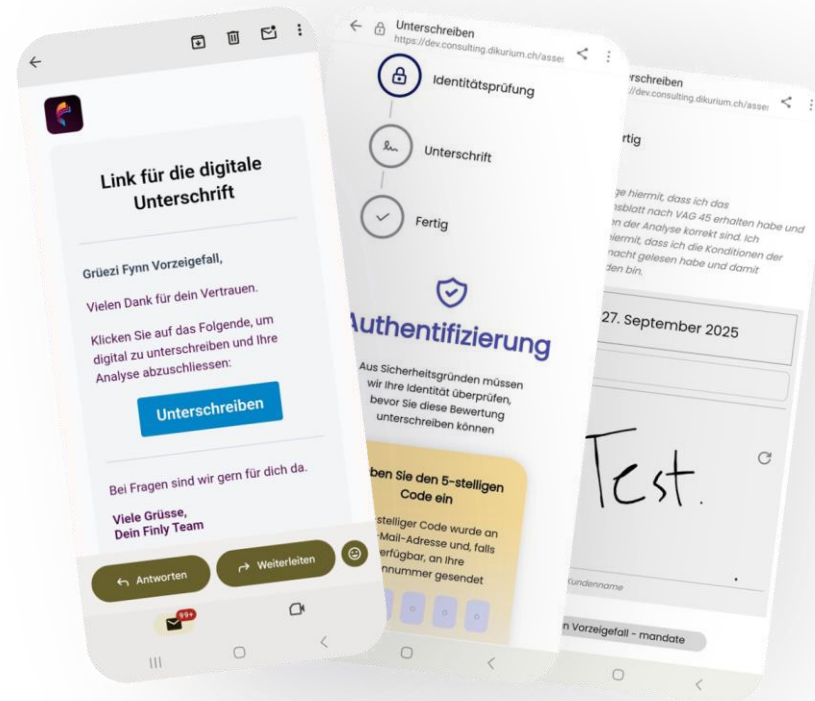
Was macht Finly **speziell**?

Analysetool

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Signaturen

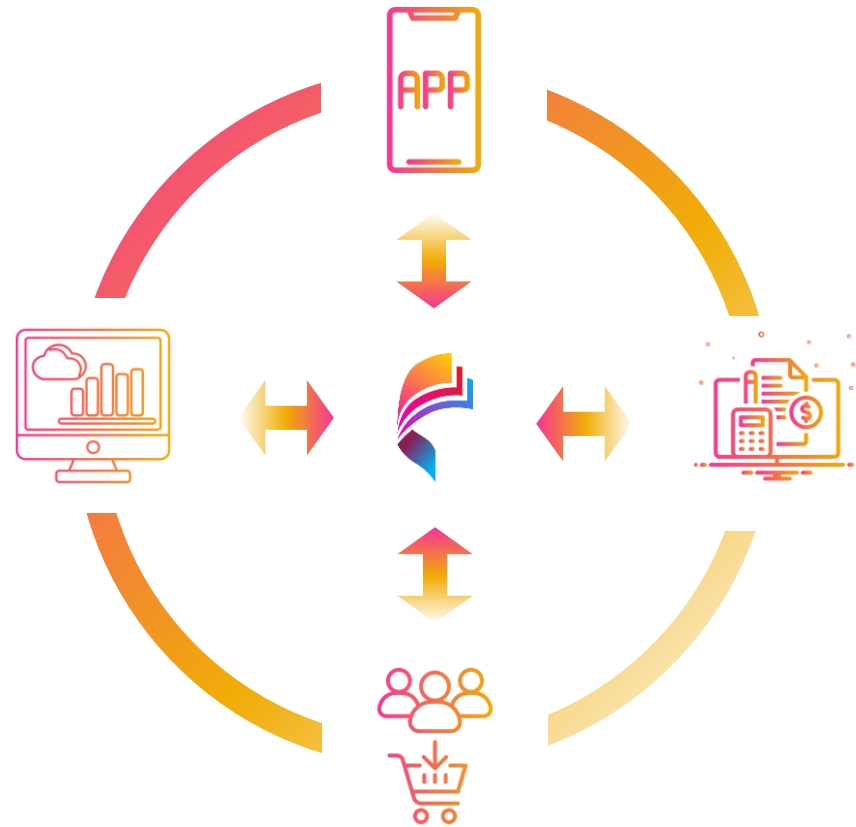


Die Zukunft der Finanzen ist **verbunden**.

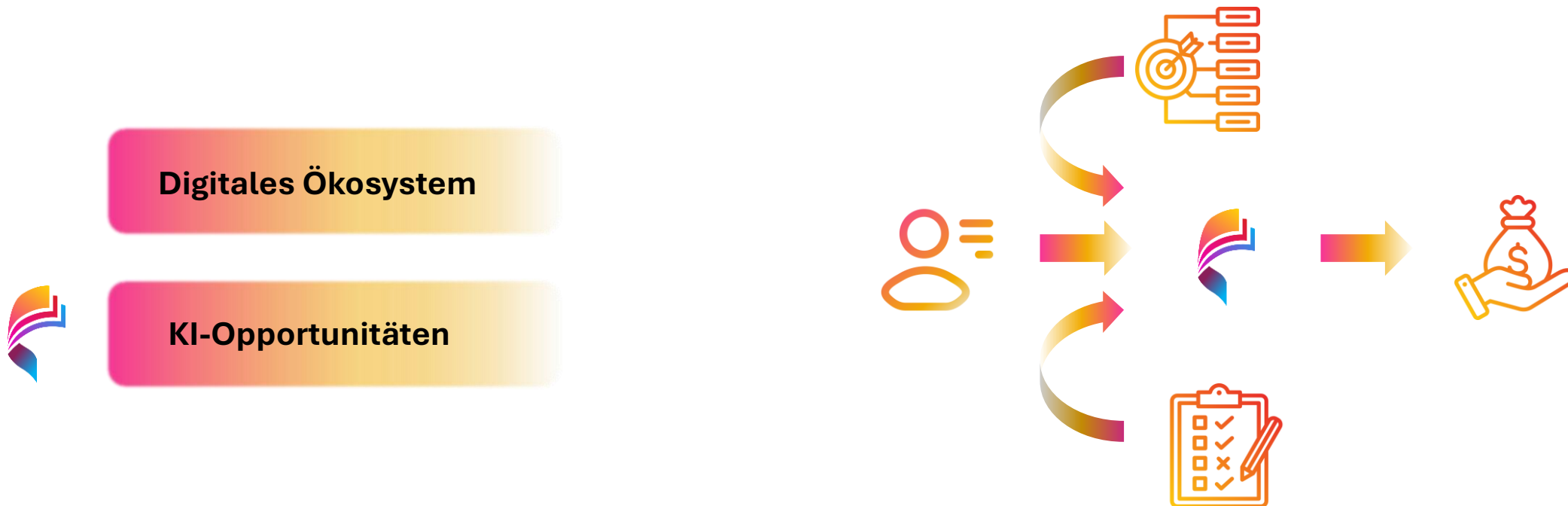


Digitales Ökosystem

KI-Opportunitäten



Die Zukunft der Finanzen ist **automatisiert.**





Dein Beratungsprozess. Einfach. Effizient. Digital.

Mehr Abschlüsse.

Stärkere Kundenbindung.

Mehr Neugeschäft.