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 Zurich



Spotlight on Revinova

Established in 1966, Revinova Treuhand AG (Revinova) are experts in complex Family Office and Trust reporting. Headquartered in Switzerland, the firm provides expert wealth and trust advisory, management and reporting services to ultra-high net worth clients. Family Office and Trust reporting is a niche market and Revinova's services are uniquely tailored to suit the complex needs of each exacting client.

Revinova Treuhand AG have used Quantios software to enable optimised client relationships for many years.

With long standing customer relationships and a team that includes some of the most recognised names in the industry, Revinova aims to understand a client's asset and transaction structures and then builds an appropriate management and reporting service around them.

Expectations amongst Revinova's client base is exceptionally high and a global team of highly qualified trust accountants and client administrators operate efficiently, discretely and with absolute privacy, for clients who only pay for the services they use.

Technology Solutions from Quantios

Revinova uses Quantios NavOne to manage the interests of around 240 trusts and client companies. The software enables the creation of a centralised database which automatically produces accounts, investment reports and wealth statements from associated trusts for client companies. Revinova uses all the main NavOne features on a daily basis including management of bank accounts, bookings payments, transaction processing, vendor and entity records. In addition, the firm uses loan card, fixed assets, foreign exchange, forward contracts and fixed asset portfolio functionality to keep its business running effectively and efficiently.

“Quantios NavOne is core to our business and we use it on a daily basis for absolutely everything, from payment processing and accounting to administrative functions and tracking key items such as trustee protector administrators and bank addresses for example”

Charles Neumann

Partner and Head of Operations, Revinova Treuhand AG

“NavOne lets us get on with supporting Revinova’s Family Office and Trust clients with a very personalised service, it’s exactly what we want from a software solution.”

Charles Neumann

Partner and Head of Operations,
Revinova Treuhand

“With an established partner such as Revinova, we work through a combination of our account management team and the Quantios project delivery framework to ensure that we continue to meet expectations – we look forward to many more years of success together.”

Peter Le Brocq

Managing Director, Quantios

Centralised database ensures security, privacy and efficiency

As Family Office and Trust reporting specialists, Revinova produces a very broad range of reports, including investment management, cash management, as well as financial- and wealth statements. These are generated using the client and financial data securely stored in NavOne. “This is a key feature so rather than having a separate accounting package and having to store a lot of data elsewhere, we can store it all in one system in a central location. This is better for security and client privacy and much better for our own efficiency.”

Of particular interest is the multi-jurisdictional capability, which is important because Revinova deals with trusts and corporate entities from multiple jurisdictions using multiple currencies, including Jersey, USA, Switzerland, BVI, Bermuda, Malta and UK companies. They exploit support for Sterling, US Dollar, Swiss Franc and Euro currencies amongst others. “NavOne contains our core client database and is vital if we are to offer such a broad range of services to our clients. The only additional tool to the software from Quantios is a separate report writer”, says Charles Neumann.

Customisation

Revinova has invested a considerable amount of time tailoring NavOne for their precise needs. This includes customising the data adapter and the different attributes required of individual Family Offices and Trusts that the firm deals with.. Altogether, this ensures that Revinova can deliver a niche offering to meet the exact needs of each unique Family Office.

“Quantios’ NavOne... is a very comprehensive and powerful system that can undertake a lot of complex data processing and reporting... NavOne helps us to populate and automatically generate reports that are highly specific. It offers us a very cost-effective yet comprehensive solution to our unique needs.”

Charles Neumann

Partner and Head of Operations, Revinova Treuhand AG

Automation

Working with the Professional Services team at Quantios, Revinova has automated many time-consuming, administrative tasks using NavOne, freeing up the account management team to focus on higher revenue-generating, added-value activities instead. “We use the data adapter quite heavily and have learned how to use this for different custodians, plus get the export files they produce. We can then build reports based on transactional data that helps us speed up the whole process and make it as cost efficient as possible.”

Through using NavOne, Revinova has developed strong administrative skills and very effective client relationship capabilities, which ensure the service delivered is very precise. Software features including accounting capabilities, multiple client portfolios, multiple currency management, flexible ledger and sub ledgers enable the team to provide a highly tailored accounting service for every client.


Personalisation capabilities


NavOne’s personalisation capability is an essential part of Revinova’s service delivery – ancillary information added to numerical reports enables the team to provide very bespoke, rather than generic, Family Office and Trust Management reporting.

According to Mr. Neumann, personalisation capabilities are key to maintaining strong client relationships. The Family Offices and Trusts supported through by Revinova using NavOne have very specific circumstances and it’s the flexibility of the system that enables them to flex the system to meet individual customer requirements.

“Quantios’ system is a very comprehensive and powerful system that enables us to undertake a lot of complex data processing and reporting on our clients’ behalf.”

Looking ahead, there is the potential to add functionality to further develop the client relationship management and business operations services which we provide today. Revinova are investigating how to further automate client accounting with bank statements and transaction reports, using feeds adapted to meet each client’s circumstances and exploiting some of the latest functionality available through NavOne and other Quantios ecosystem partners.



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