

A photograph of three business professionals in a modern office setting. A man in a dark suit and tie is on the left, a woman in a light-colored blazer is in the center, and a man in a dark suit and glasses is on the right. They are standing near a large window, looking at each other and smiling. The scene is overlaid with a dark blue diagonal gradient.

**TRANSFORMING WEALTH
MANAGEMENT FOR GOOD**

**EMBRACE TECHNOLOGY,
PRESERVE HUMANITY**

Future-proof your wealth management business

Sharing our vision

Since 2009, KeeSystem has been driven by a relentless pursuit to redefine the landscape of wealth management. We envision a future where wealth management professionals transcend conventional boundaries, embracing innovative strategies that deliver meaningful outcomes for their clients.

Our mission is to be the catalyst for this transformation. With a deep understanding of the evolving needs of wealth managers, we equip them with the tools, knowledge, and support to not only survive but thrive in a dynamic landscape. We foster a culture of continuous learning, empowering professionals to adapt to emerging trends and technologies.

Our purpose extends beyond the present. We are shaping the future of wealth management by encouraging a client-centric approach, trust-based relationships, and a commitment to long-term success.

“

We believe and promote a future where success is measured not only in financial gains, but in the lasting impact we create.

”



Charting our story

2004 : A team of wealth managers got tired of the limitations imposed by existing portfolio management software. They decided to create their own. KeeSense was born.

2004-2009 : Just like good wine, it took several years to grow KeeSense. It was used and trained by expert wealth managers until the level of excellence was obtained.

2009 : Creation of KeeSystem in Monaco.

2011 : Celebrating our first clients in Luxembourg !

2012 : KeeSystem opens in Switzerland.

2015 : We are proud to have clients in Brazil.

2017 : KeeSystem is selected by MonacoTech, the startup program of Monaco Government and Xavier Niel.

2017 : KeeSense is awarded Best Portfolio Management Software.

2020 : Launch of the new version 6 of KeeSense.

2021 : The Groupe Ebene enters the capital of KeeSystem. KeeSystem opens in Luxembourg.

2022 : Collaboration with the Monaco Government for Ficobam.

2023 : Release of the version 7 of KeeSense.



Claiming our values



EXCELLENCE

In all our actions, we demand excellence, paying great attention to detail without compromising on quality. We are true "IT craftsmen", working with passion, meticulousness, and patience to develop solutions that best suit our clients' needs.

TRANSPARENCY

We do what we say. We say what we do. We ensure that we communicate accurate and honest information about our solution, project management, and throughout the client relationship, including billing. Transparency forms the foundation of a trustworthy relationship for us.

INNOVATION

Every team member contributes to our technological watch. We explore every avenue to nourish our minds, improve our solutions, and conceive new ones. We believe in continuous improvement, always striving to do better, and embracing the excitement and pleasure of taking on new challenges. We are forward-thinking.

PARTNERSHIP

We aim for growth based on healthy and long-lasting relationships with our clients and stakeholders in our market. We value virtuous exchanges that create value for every member of the ecosystem.

STABILITY


KeeSystem is an independent company with a family-owned shareholder structure. We act with a focus on sustainability. This value is reflected in our human-scale management and a loyal team united by a common mission.

COMMITMENT

We believe in pushing ourselves to go above and beyond in the service of a shared mission: making our clients' daily lives easier and helping them grow their business through our technology. We place work and discipline at the core of our approach, fostered by a sustainable family governance structure.

EXPERTISE AND SERVICE INTEGRATION

We embrace a culture of internalizing expertise, knowledge and service, allowing us to be both producers and direct distributors. This approach enables us to maintain transparency throughout the value chain, building trust and open communication with our clients.





Empowering our clients



Our expertise in data integration and aggregation makes us a privileged partner for industries relying on sensitive data. With our award winning portfolio management solution KeeSense, we have been serving independent wealth managers, family and multi-family offices, private banks, and trustees since 2009.

Today, KeeSystem has a global presence and has built strong relationships with more than 250 users worldwide.

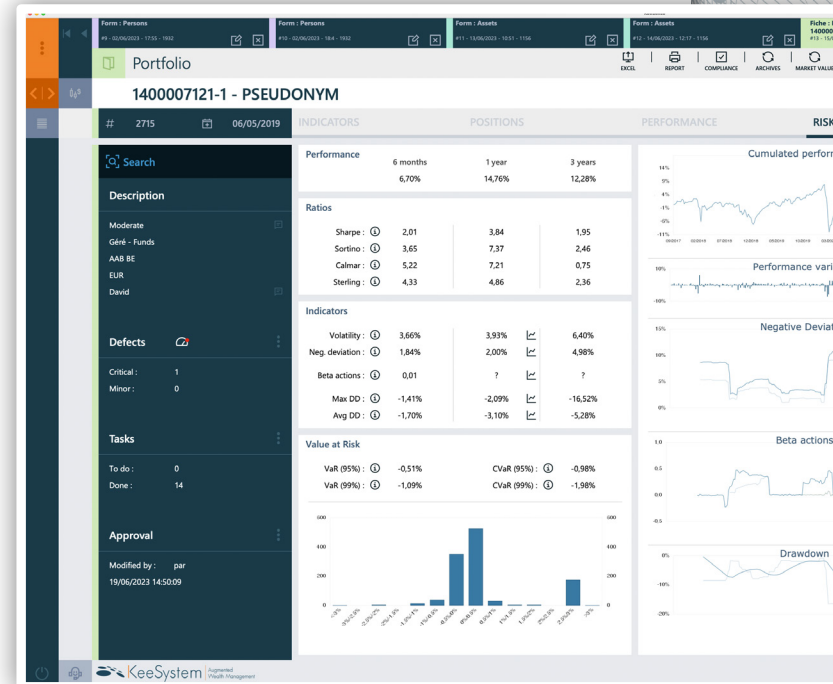
- Independent wealth managers
- Private banks
- Family offices
- Trustees

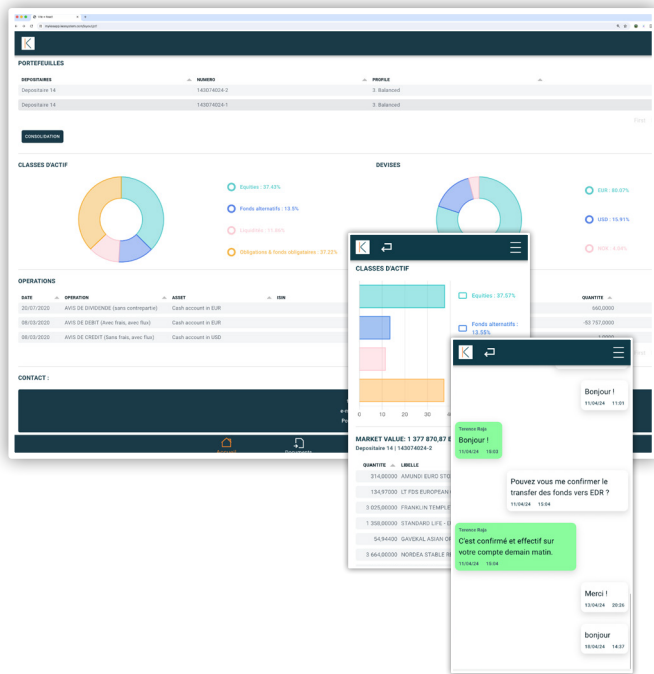


Cutting-Edge Technology

KeeSense

Since 2009, KeeSense portfolio management software solution helps wealth management professionals digitalize and automate their business. KeeSense provides a workspace to manage the essential activities of wealth managers, such as client relationship management, portfolio management, compliance and risk management and administrative supervision.





MyKeeApp

With MyKeeApp, wealth managers can offer their clients secure access to their assets, anytime, anywhere.

KeeFicobam

With KeeFicobam, banks automate and secure the declaration of their clients to their supervisory authority (Siccfm, DGFIP, FINMA, CSSF).

KeeMo

PropTech solution that helps real estate agencies manage the transactional and rental activities and their compliance obligations with a unique solution.

Bespoke Development

Our experience and expertise in data management and software science allows us to design complex software solutions tailored to the unique needs of organizations. From inception to implementation, we work closely with our clients to understand their goals and challenges, ensuring that our bespoke development services align perfectly with their vision.

A photograph of a business meeting with a dark teal overlay. In the background, several people in professional attire are visible, some holding documents. The foreground shows a person's hands holding a pen over a document. The text "Offering our expertise" is centered on the teal overlay, flanked by two horizontal orange lines.

Offering our expertise



KeeSystem is reknown for its expertise in data integration and software development, providing organizations with tailored solutions to seamlessly integrate, manage, secure, and consolidate sensitive data from multiple sources. Our specialized capabilities are particularly well-matched for financial institutions and organizations that depend on sensitive data, as wealth management firms, family office, banks and governmental institutions among others.



Data Excellence: Exchange, Treatment, and Aggregation

We specialize in data excellence, encompassing data exchange, treatment, and aggregation. Our thorough experience in gathering, consolidating, and treating data from multiple sources allows us to provide businesses with a comprehensive and unified view of their information. With expertise in data encryption, secure storage, and stringent compliance measures, we ensure data confidentiality, integrity, and privacy. Through advanced data aggregation techniques, we streamline the process, eliminating data silos and enhancing accuracy.

Portfolio Management

We understand the distinct challenges that wealth managers face in effectively managing a wide range of assets, both financial and non-financial. Our technology solutions are meticulously designed to meet the specific needs of this diverse landscape, offering comprehensive functionality, advanced analytics, and seamless integration.

Document Management

Our expertise in electronic data management ensures easy access, version control, and reliable storage of important files, facilitating effective collaboration and information sharing. Businesses can rely on document management, minimizing administrative burden, and maintaining a robust framework for effective information governance.

Data Aggregation

We help organizations gather and consolidate data from multiple sources to obtain a comprehensive and unified view of their information. Through advanced data aggregation techniques, we streamline the process of collecting and organizing data, eliminating data silos and enhancing data accuracy. We empower businesses to make informed decisions, identify valuable insights, and unlock the full potential of their data.

Reporting & Data Visualization

We transform complex data sets into visually compelling reports and interactive dashboards. By presenting data in a user-friendly format, we empower our clients to gain actionable insights, effectively communicate information to their clients and valorize their expertise and services.

Business Automation

We have strong expertise automating processes to streamline workflows, eliminate manual interventions, and drive optimal results. By automating repetitive tasks, we help businesses and organizations increase operational efficiency, reduce costs and improve decision-making.

Interconnected Workflows

In today's interconnected work environment, effective communication between tools is essential for staying competitive. KeeSystem's expertise in workflow automation and integration with external tools allows businesses to achieve seamless operations, ensuring a high level of data quality and security.



Relying on our worldclass references

ANDBANK /
Private Bankers

 Fides Capital

 CAPLAND S.A.

Julius Bär

 MIRAZUR
CAPITAL

 SCALA
PATRIMOINE

 **Gouvernement Princier**
PRINCIPAUTÉ DE MONACO

 CREATERRA
Partenaire de votre Patrimoine

 AZURE
WEALTH

Work with your favorite tools and partners

We are aware that your diverse needs extend beyond the capabilities of KeeSense. That's why we are committed to fostering an open and connected ecosystem by partnering with a range of industry-leading service providers.

PEERS COMPARISON



ESG



ALTERNATIVE ASSETS PLATFORM



MONACO FOUNDRY

SCREENING TOOLS



DOW JONES



WORLD-CHECK™
REDUCING RISK THROUGH INTELLIGENCE

MARKET DATA PROVIDER



Bloomberg



REFINITIV 

+100 CUSTODIAN BANKS CONNECTED TO KEESENSE



Julius Bär





Working with you ?

A QUESTION ? A DEMO ?
WE'D LOVE TO HEAR FROM YOU!
HERE IS HOW TO REACH OUT

Send us an email :
contact@keesystem.com

Not ready to talk yet ?
Let's stay connected!

Follow us on

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