



## Jerome Schonbachler TheMFO

**Jerome Schonbachler launched TheMFO in December 2018 in order to cater for the needs of entrepreneurs, media and sports people as well as people involved in the blockchain industry.**

When we met Jérôme, he was in the "building up" phase: TheMFO was just born, the offices newly rented and the client base was starting to ramp up. To keep his operations lean and efficient, he was looking for a simple solution to aggregate all his custodians while integrating with his existing CRM and Bloomberg.

At the beginning, Jérôme was juggling between a dozen of e-banking systems, each with a different token, login system and data format. Most of his clients are fast-paced entrepreneurs used to instant data access and who don't want to wait too long to get an answer to their questions. They also want to know clearly what's the overview, the performance and what's in the portfolio. TheMFO's team had to juggle between excel files, copy paste and error checks before getting to an exhaustive answer. Last but not least, in Jerome's own words: "we could not

really check how much custodian banks and brokers were charging us - and where our trading fees were actually going".

„What we liked with Simplewealth was that the same people talking business with us were then able to go and implement alongside the IT teams. Nothing got lost in translation. The speed of implementation was much higher and the IT teams at our custodian partners trusted their technical understanding“. Jerome Schonbachler

The day after we signed our partnership contract, the Simplewealth team got on the move by reaching out to all of Jerome's contacts at his custodian banks. The biggest ones had processes and requests in place, but the team worked with the IT departments of the smallest ones to define the required data format field by field. Now, after TheMFO, its custodians and Simplewealth worked together, Jerome now has access to his clients' portfolios from his CRM. He can send them personalized and meaningful investment proposals at the click of a button or at any time. •



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