

Toni Köhli

Swiss Business Leader Gains 360° View of Total Wealth Beyond Tax Season

As the owner of a management consultancy, Toni Köhli helps successful Swiss companies overcome financial challenges. With over 25 years of C-level experience in the digital economy, he currently serves on the boards of directors of companies in the robotics, industrial automation, software-as-a-service, horticulture, and auditing and fiduciary services industries.

When turning his CFO's eye to his own finances, Toni realised that using spreadsheets to track his personal business cash flows and diversified investment portfolio was giving him poor ongoing visibility of his wealth and was wasting too much of his valuable time.

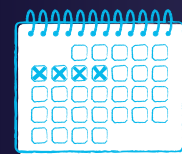
As an award jury member at the 2020 Swiss Economic Forum, Toni reviewed Altoo and was so impressed that he soon turned to the company for help in making his life easier.



 **Toni Köhli**
Board Member, CFO



Quarterly
Visibility of total wealth



Daily
Visibility of total wealth

FAVOURITE FEATURES

Automated analysis

for dividend forecasts and transaction reconciliation

Data connectivity

to multiple banks and custodians

World-class support

from locally-based professionals

CHALLENGE

With spreadsheets, Toni was able to gain a holistic picture of his finances only quarterly or when taxes were due. As a client of several banks, he needed to log in to each one's online portal to access transaction data to be copy-pasted for manual analysis and reconciliation.

Dividend forecasting required significant effort, as did keeping tax-related documentation properly organised and stored. Additionally, Toni was not confident that his younger family members would be able to understand the complexity of his wealth or how to track assets properly when their time to own them would come.

"I needed to understand my portfolio performance during tax season, but I wanted to be able to understand it year-round. Spreadsheets were not going to get me there; the idea of sourcing and entering data – let alone actually doing so – every day is too unpleasant."

SOLUTION

The Altoo Wealth Platform automatically aggregates, analyses, and visualises Toni's transaction and asset performance data from his banks. Also, all his real estate holdings, mortgages, and corporate investments are clearly displayed and tracked.

Dividend forecasts and transaction reconciliation are automated, all relevant documentation can be linked logically to each associated asset, and Altoo's Wealth Servicing Team is always available to answer any and all of his questions.

"When I first came across the Altoo Wealth Platform, I was impressed by the idea of having so many useful features in one place. The team has executed on this idea perfectly."

RESULTS

With Altoo, Toni has greatly reduced the time and effort required to understand his wealth, which he can now see holistically every day. The platform gives him valuable insights, an easy way to store all his important digital files, and confidence that his heirs will be able to easily take charge of his assets when the time is right.



Times per year total
wealth understandable

2,500+

Digital files stored

10+

Hours saved
every month

» An intuitive dashboard and reliable data quality that end users can trust

“Before I started using the Altoo Wealth Platform, ‘touching base’ with my investments was not possible more than once or twice a year. Now I just log in and the legwork has already been done. Far more insights in far less time is a powerful combination! The technology is great and so is the team behind it. Very responsive and helpful people.”

Toni Köhli
Altoo Client



“Toni is an accomplished numbers man who truly understands the value of accurate, well-presented financials. Having him as a satisfied client means a lot to us. We also appreciate his on-point feedback about ways to continue improving the Altoo Wealth Platform. We look forward to serving him and his family for years to come.”

Ian Keates, CEO at Altoo



However Toni’s portfolio evolves, the Altoo Wealth Platform will bring it into perspective.

VISUAL CONSOLIDATION

of everything owned and owed

Bankable assets

categorised with detailed portfolio performance, fee benchmarking, and comparison options

Non-bankable assets

with income and expense breakdowns for rental properties, collectibles, and more with relevant files attached

Liabilities

including PE and VC capital commitments, mortgages, and loans, logically linked to holdings



BEHIND THE SCENES

APIs

World-class application programming interfaces (APIs) allow Toni's latest banking data to flow directly into the platform.

»» Data connectivity

to multiple banks and custodians

Data transformation

For converting transaction and statement formats, validating records, and forecasting dividends in partnership with Divizend GmbH, a fintech specialising in equities and tax reporting solutions.

»» Automated analysis

for dividend forecasts

Machine learning

For correlating or directly matching funds flowing between his accounts at separate institutions or from an account into a specific asset. Unmatched transactions are flagged for manual review.

»» Reconciliation

of transaction records

Private cloud

Hosted exclusively in a tier 4 Swiss data centre for superior security and peace of mind. An intuitive interface makes it easy to upload and keep track of documentation.

»» Storage

of digital files linked to appropriate wealth items

Local assistance

The Altoo Wealth Servicing Team is standing by to manage all paperwork formalities for Toni's banks, answer all his questions, and help him get the most value from the platform.

»» World-class support

from Swiss-based professionals

Client-centricity

Since 2017, Altoo has continuously sought to discover and deliver innovative ways to bring clarity to large, diverse portfolios.

»» Intuitive design

cutting time-to-insights