

NETinfo

DIGITAL BANKING PLATFORM

Case Study



Euro Pacific Bank





Euro Pacific Bank

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Case Study

Euro Pacific Bank is an international financial group in the banking, brokerage, mutual fund and financial services industries, licensed in Puerto Rico. For the last decade and a half, Euro Pacific Bank and its subsidiaries have offered a wide array of financial services from offices in the Caribbean. Through a dedication to client service and a diverse multi-currency product offering, clients enjoy unrivalled access to the global investment markets. The Bank's online, multi-channel access provides account holders with 24/7 access to their accounts, regardless of where they are located.

The Bank's unique full-reserve policy provides clients the safety and stability they require to manage their global finances. As an investment brokerage and advisor, and 12 year-long White Label Partner of Saxo Bank, the Bank is able to pass along foreign exchange savings rates of up to 80% over traditional retail banks. The Bank also maintains the distinction of acting as the only bank, which is also Approved Dealer for the Perth Mint in Australia.

2007

Year Founded



Geographical presence

📍 International Financial Entity

(Digital only bank with customers mainly in Europe, Canada and S. America)



Headquarters

53 Palmeras Str., 10th Floor, San Juan, 00901, Puerto Rico



Line of Business

⇌ Transactional banking and investment services including FX and metals trading



Employees

40

Other key metrics



6000 Customers



15000 Accounts

Source: Euro Pacific Bank and www.europacbank.com/

Challenge

The Bank wanted an independent, customisable, efficient, secure, multi-lingual and multi-currency solution to serve digitally its customers mainly in Europe, Canada and S. America. The new solution would have the capability to provide retail, investment and wealth management functionality and advanced personalisation management tools such as widgets management and PFM tools.

In the digital structure of the Bank, with only one branch, all transactions and facilities should be handled by digital channels on a user-friendly and easy environment. Additionally, it would enable the management of the channels in an efficient way, optimise the operational structure and cost with minimum personnel.

Within the scope of its digital banking project, Euro Pacific Bank had to implement a core banking and digital channels solution on the cloud. For this, the Bank needed flexible integration capabilities with their core banking system on the cloud and central administration management, that would include channels, marketing material, services, functionality, access levels, limitations and support customer segmentation. The Bank also requested a flexible self-service capability in order to add new services and functionality.



**“Bank with
only one
branch”**

Solution

For Euro Pacific Bank we delivered a responsive internet banking solution, covering all browsers and devices, with rich functionality for their retail, investment and wealth management customers. Additionally, we provided advanced alerts & notifications management tools, a comprehensive administration module for the central management of the NETinfo solution, and a powerful authentication suite.

Part of the administration module is the dynamic pages feature, a useful tool for the Bank in order to easily design and deploy new services at channel and customer group level. Through our solution, the Bank can also offer trading and investment services to its clients.

“ Design and
deploy new
services at
channel and
customer
group level ”

Benefits

- ✔ A modern widget-based dashboard and an aggregate and detailed insight of customers' financial position and analysis and full money and investments management.
- ✔ Providing a broad range of functionality, including advanced tools for investment and wealth management functionality, to its existing customers, while enabling the Bank to acquire new ones.
- ✔ The Bank successfully executes targeted campaigns through the electronic channels, addressing different type of customer segments including millennials, basic retail, ladies, SMEs, students and any other segments dynamically created by the Bank.
- ✔ NETinfo Digital Banking Platform is a digital tool for the Bank, exposing any service to the channels securely, easily and without seeking for vendor's assistance or intensive IT resources.

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