



A true leader in fintech

When it comes to investing, the industry has come to a gradual understanding that education is key. Investae understands that amid a crowded marketplace and an increasingly digital landscape, the prospective investor seeks clarity above all else

INTERVIEW WITH
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Investae is a fintech with offices in London and Moscow, which prides itself on serving clients in over 30 countries. The company provides a licensed solution for investment firms, bond issuers, wealth managers, private bankers, and alternative investment fund managers, and is designed to make the capital-raising process easier.

Why is your solution new and competitive?

Our aim is to simplify the distribution of financial instruments, whether bonds, equity, real estate, funds, or any other type of investment product. We have gained a complete understanding of the main hurdles faced by investment distributors. We innovate by striving to simplify each step of the capital raising process as much as possible, so that investment managers can focus on what they do best: managing money. We offer a unique solution in the market, providing our clients with guidance, sales and marketing tools, ongoing support,

and a continual improvement of results. What's more, Investae utilises artificial intelligence in the continual process of improving the solutions that we are providing.

For example, there is no longer a need to prepare materials describing each investment proposal in order to persuade your prospects. There is no need to even compose marketing emails. All you need to do is click 'send' while using our system. Our team members not only train our clients how to deliver their sales pitches, but they also prepare these investor presentations in advance. Our clients can benefit from the experience of each member of their sales team by gathering all objections and tricky questions into a single dedicated forum, what we call the 'objection centre.' It is designed to inform sales team members about the objections they could face, so that they are better prepared to overcome them.

How is the market evolving?

The financial world is changing fast and undergoing a digital revolution. Undoubtedly, it is becoming increasingly hard for anyone looking to raise capital to stand out in an overcrowded marketplace. Nowadays, investors require a soft-skilled and educative approach, instead of simply being solicited.

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Similarly, financial professionals need an effortless, smooth-running, and time-saving sales process. We strongly believe that raising capital from investors requires a more sophisticated marketing approach, which utilises all the benefits that our varied digital tools bring into the picture. This is something the market currently lacks, and it is something we excel at. The sell-side of the investment industry has been left behind by asset managers who would often use approaches that are very similar to each other, yet lack efficiency.

What challenges are usually faced when raising capital among investors?

Potential clients are constantly bombarded with investment proposals. That is why it is hard to grab investors' attention. However, the most common mistake many advisors make is they do not take their prospects' wants and fears into account. They contact anyone that they think might be interested, following a blanket approach, which means that they do not know how to appeal to potential investors. That is the very problem we solve. Investae runs comprehensive training sessions for our clients, presenting the best techniques on how to secure meetings with prospects, grow their network, deal with indecisive and less financially educated prospects, and get them to respond.

How can your capital-raising tool be used?

Investae offers a platform that uses white-label licensing. As a result, the capital raising process is considerably simplified, which enables our clients to raise money faster: all marketing efforts are already in place, leading to a huge time saving. Companies are then able to hire new agents and distributors, add them to their existing teams, train them, and instantly manage their work. Thus, this tailor-made licensed platform will assist our clients' own sales teams in selling their own products.

What are your objectives for the next five years?

Our team's day-to-day efforts are directed to continually increase the value we provide. The primary goal of Investae is to widen the range of services we currently offer to various industries and sectors and gradually become the leading fintech company in the field of capital raising. We aim to change the entire appreciation of this process and bring it to the next level. ■