

# Is your investment bank competing as effectively as it can?

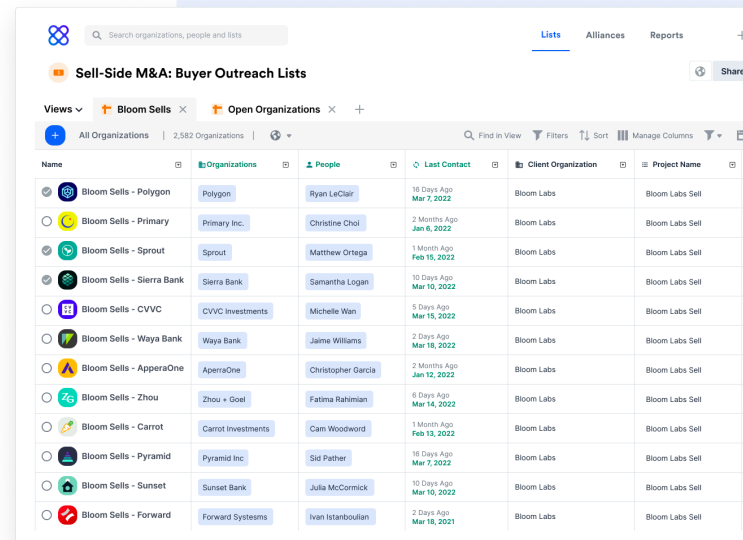
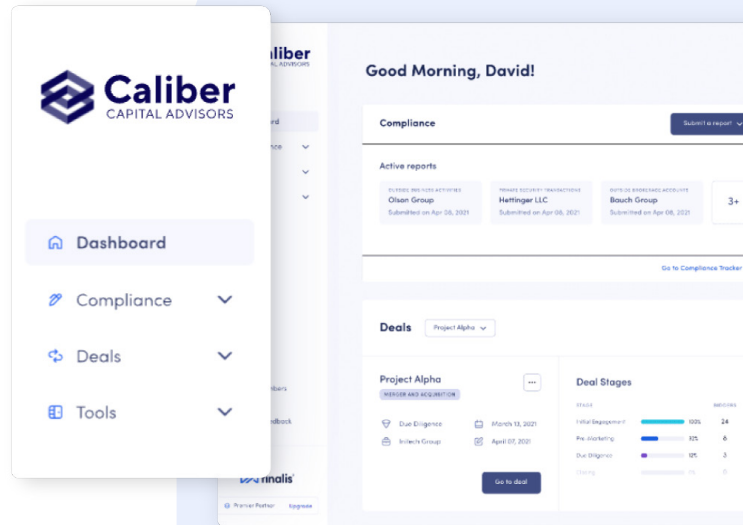
Together, Affinity and Finalis form the foundation of a comprehensive

**Finalis** enables the investment banking industry to operate compliantly. The regulatory affiliation and compliance platform offers a white-labeled, back-office solution for a wide range of private market dealmaking.

The Finalis Hub delivers a hassle-free deal management solution and a proprietary Mandate Marketplace that connects private securities brokers with one another and enabling them to explore deal collaborations.

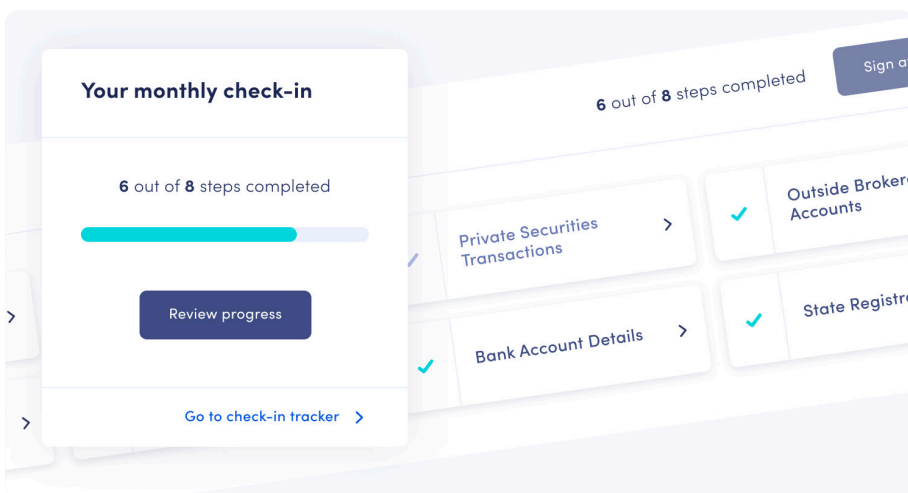
**Affinity** is a relationship intelligence platform that replaces transactional CRMs with technology specifically designed for investment banking.

By surfacing hidden relationships between members of your team and their business connections, it enables you to source, manage, and close faster—all with easy-to-use software and fast time-to-value.



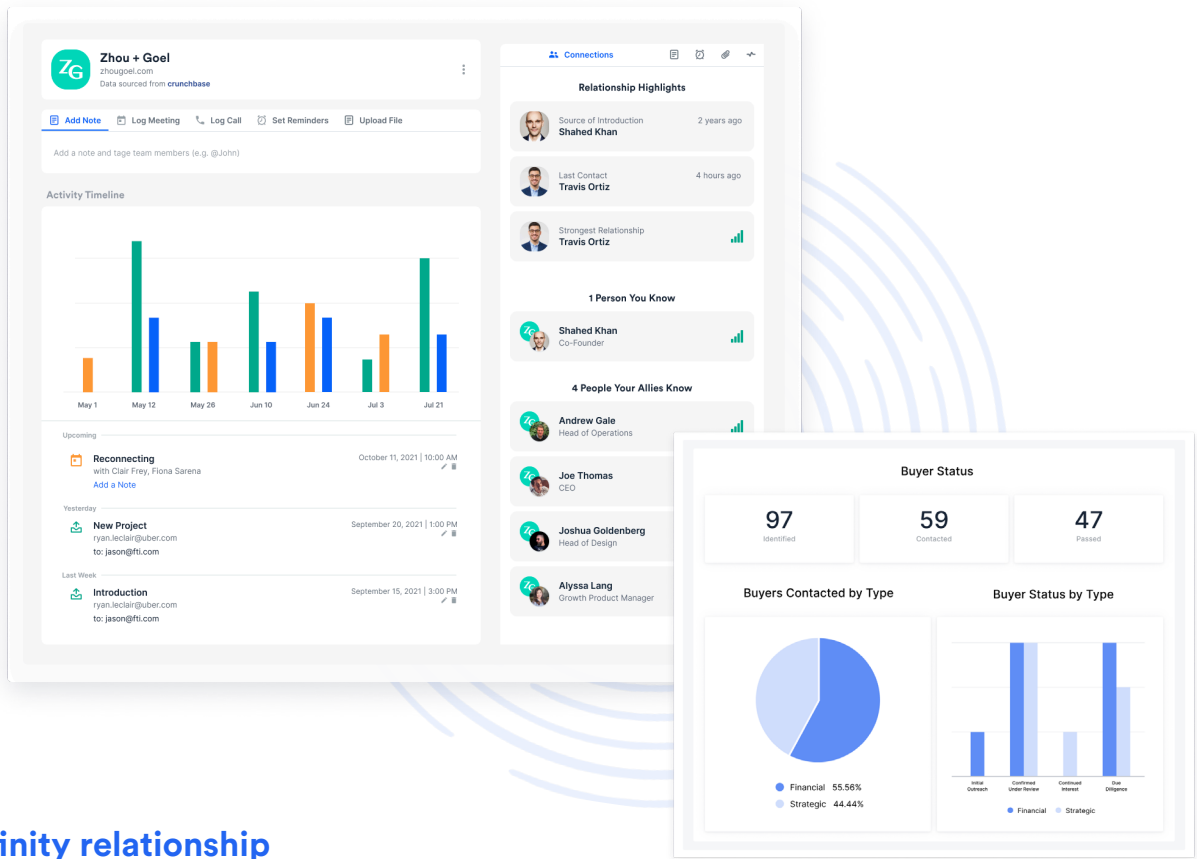
## The Finalis fully tech-enabled broker-dealer platform

- Broker-dealer platform providing white-labeled regulatory affiliation
- Tech-enabled compliance support
- Access to continuously updated world-class legal templates
- Research and analytics support
- Collaboration with the fastest-growing network of investment banks
- New deal flows accessible via the Finalis Mandate Marketplace
- Built-in virtual data room solution
- White glove customer service and support
- End-to-end, turnkey support for brand identity and marketing strategy



“Finalis provides us with a turnkey, value added Broke Dealer where service always comes first.”

**GREG RICHARDSON**  
*Managing Partner  
Juno Capital*



## The Affinity relationship intelligence platform

- CRM platform designed specifically to support investment banking
- Auto-captured email and calendar data
- Single source of truth that eliminates data silos
- Data enhancements from proprietary and third-party industry sources
- Automatic custom reminders and notifications
- Easy-to-share, in-depth reporting and analytics
- AI-driven relationship scoring
- Lightweight, easy-to-use, quick-to-implement platform
- Built-in compliance with SOC2 Type II, GDPR, and CCPA.



**Find out how Affinity and Finalis can work side by side to strengthen your bank's dealmaking.**

[growth@finalis.com](mailto:growth@finalis.com) | [info@affinity.co](mailto:info@affinity.co)