CASE SUMMARY 01 / FINANCIAL PRODUCT DELIVERY

Private banking on mobile.

Product experience and design, with integration collaboration alongside the development team at Temenos.

The problem

A Swiss private bank wanted a mobile client experience that reflected its personal service. Portfolio information, advisory interactions and secure communication needed to work together in a client-facing product.

Windmill's role

Windmill was selected as the design partner and worked with the third-party development team at Temenos on delivery and integration with the core banking platform and other systems.

The product decisions

The solution brought portfolio views, personalised insights, advisory interactions and communication into a mobile experience. The case explains the design and integration work behind those capabilities.

What this demonstrates

Financial product design and collaboration around an existing banking estate. This is not presented as an AI deployment. No quantified commercial outcome is claimed in this summary.

Read the private-banking case and see the product

Explore Product Build & Scale

CASE SUMMARY 02 / AFFILIATED VENTURE WORK

KYC suggestions a reviewer can inspect.

KYC workflow design and engineering for an affiliated venture in private markets.

The problem

Investor onboarding spans different document types, profile structures and jurisdictions. The workflow needed to connect document collection, suggested form values, conflicting information and the advisor's final review.

The solution described in the case

Multi-document upload and processing progress lead to suggested profile fields. Missing information and conflicts are surfaced. Advisors can validate or override suggestions field by field, with a record of the action.

The important design decision

Correction is part of the workflow. A generated value is reviewable information, rather than evidence that a required check has been completed.

Evidence and scope

This is affiliated venture work, not an independent bank reference. The summary describes the workflow and controls; it makes no independently verified production benchmark or universal efficiency claim. A new institution needs its own representative data and acceptance criteria.

Read the KYC workflow case

Explore Proof of Value