

Mon Patrimoine: a new wealth management solution for Societe Generale Private Banking clients

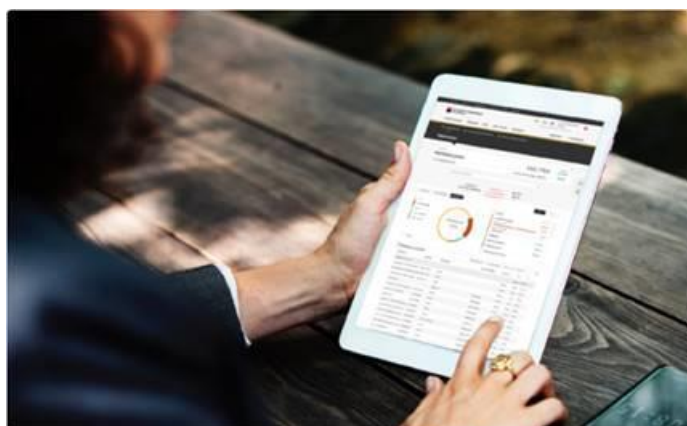
Press Release

Paris, 30 January 2019

Societe Generale Private Banking is launching Mon Patrimoine, a new solution developed with and for our private banking clients in France. Through a single Internet and mobile interface, it provides them with a comprehensive view of their entire portfolio, whether it is housed at Societe Generale or not.

Societe Generale Private Banking is continuing to expand its digital services offering in order to always provide its clients with the best global management support. The Bank is today launching a new solution enabling every private banking customer in France to obtain a clear and accurate view of their entire financial situation: financial assets, non-financial assets, loans, whether held directly, jointly or via a wealth management structure.

In order to provide a comprehensive experience, Mon Patrimoine (“My Assets”) also offers the aggregation of clients’ accounts housed in other establishments. This step, like details of non-financial assets, is in each user’s hands.



Efficient and innovative

Mon Patrimoine has been put together and tested with the Private Bank’s clients to create the best possible user experience. The solution stands out through the high level of detail offered in the presentation of its material and through its entirely customisable aspect.

Thanks to the information collected and updated each day, three summaries dedicated to financial assets are notably provided: by establishment, by type of contract and – a genuine innovation – by asset class and subclass.

“I only have a bank, but this tool is remarkable. It allows me to visualise all my assets, from assets held in my “SCI patrimoniale” property investment portfolio to my employee savings plan”, comments one of the first user clients.

Secure and multichannel

Mon Patrimoine is available for free from today via the Online Client Area and the Societe Generale App*. In keeping with our requirements with regard to client data confidentiality, the Mon Patrimoine solution is highly secure, and the Bank will not have access to data concerning other financial establishments, unless authorised by the client. Indeed, it is possible to transmit some or all of this information to your banker in order to benefit from advice that is tailor-made to your global wealth situation.

“Mon Patrimoine meets our clients’ new expectations in terms of wealth management: benefit from clear, simple and accurate tools enabling them to have a global view of all their assets”, comments Franck Bonin, Director of Commercial Development for Societe Generale Private Banking.

Following the launch of Synoé at the end of 2018, Mon Patrimoine further enhances the digital services offering provided by the Private Bank, and supplementary features will be continually added. From this year, for example, a tool for analysing financial asset allocation will become available, the results of which the client can share – on their initiative – with their banker in order to always have the best possible support in managing their wealth.

⁽¹⁾ The Societe Generale App can be downloaded for free from Google Play and the App Store (free apart from any connection costs charged by your ISP). Google Play is a registered trademark of Google Inc. App Store is a registered trademark of Apple Inc.

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Societe Generale

Societe Generale is one of the leading European financial services groups. Based on a diversified and integrated banking model, the Group combines financial strength and proven expertise in innovation with a strategy of sustainable growth, aiming to be the trusted partner for its clients, committed to the positive transformations of society and the economy.

Active in the real economy for over 150 years, with a solid position in Europe and connected to the rest of the world, Societe Generale has over 149,000 members of staff in 67 countries and supports on a daily basis 31 million individual clients, businesses and institutional investors around the world by offering a wide range of advisory services and tailored financial solutions. The Group is built on three complementary core businesses:

- **French Retail Banking** which encompasses the Societe Generale, Crédit du Nord and Boursorama brands. Each offers a full range of financial services with omnichannel products at the cutting edge of digital innovation;
- **International Retail Banking, Insurance and Financial Services to Corporates**, with networks in Africa, Russia, Central and Eastern Europe and specialised businesses that are leaders in their markets;
- **Global Banking and Investor Solutions**, which offers recognised expertise, key international locations and integrated solutions.
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Societe Generale is included in the principal socially responsible investment indices: DJSI (World and Europe), FTSE4Good (Global and Europe), Euronext Vigeo (World, Europe and Eurozone), four of the STOXX ESG Leaders indices, and the MSCI Low Carbon Leaders Index. For more information, you can follow us on Twitter @societegenerale or visit our website www.societegenerale.com

Societe Generale Private Banking

Societe Generale Private Banking, the wealth management arm of Societe Generale, is one of the leading private banks in Europe, with EUR 113 billion of assets under management at the end of December 2018. With 2,500 staff in 15 countries across the globe, Societe Generale Private Banking offers wealth management solutions to entrepreneurs and High Net Worth Individuals.

The expertise of its private banking teams in wealth planning, investment advisory and financing solutions regularly receives awards. In 2017 and 2018, Societe Generale Private Banking was voted:

- Best Credit Provider (WealthBriefing Swiss Awards, 2018)
- Best Private Bank for Sucession Planning (PWM/The Banker 2018)
- Outstanding Private Bank - Western Europe (Private Banker International, 2017)
- Meilleure équipe d'Ingénierie Patrimoniale (WealthBriefing European Awards, 2017)
- Best Wealth Planning Team (WealthBriefing European Awards, 2017)
- Best Wealth Manager in France - Affiliate Bank (Leaders de la Finance, 2017)
- Best Private Bank for Entrepreneurs in Western Europe (Global Finance, 2017)

www.privatebanking.societegenerale.com

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