

From Legacy to Leading Edge: Where Human Expertise Meets Smart Technology

How do you cultivate a culture that consistently drives excellence and high performance?

At ERI, we believe excellence starts with people. We foster a culture that encourages curiosity, continuous learning, and constructive feedback at every level. Welcoming new generations of talent who challenge established ways of working and question assumptions is a key driver of progress, helping us better align with our clients' strategic objectives. Anticipating change, understanding emerging trends, and investing in our teams, both in technology and industry expertise, are essential to staying relevant and delivering meaningful added value.

Our greatest satisfaction comes from delivering solutions that genuinely improve our clients' daily operations and long-term performance. This people-centric approach, supported by a robust and scalable platform, enables us to innovate with purpose and help banks deliver personalised services, launch new products, and adapt to regulatory constraints with confidence.

What role has collaboration - either internally or with external partners - played in your success?

Collaboration with our clients and business partners is a cornerstone of our product strategy and a critical factor in our success. Through continuous dialogue and close cooperation, we exchange insights, challenges, and strategic objectives, enabling our teams of experts to address pain points specific to each financial institution and market. At the same time, we leverage global implementation experience and proven best practices to streamline operations, helping banks become more agile, efficient, and better equipped to evolve in a rapidly changing market.

What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

AI is fundamentally reshaping how advice is created and scaled, and this transformation is still in its early stages. As demand rises for private equity and credit, structured solutions, and tokenised instruments, wealth managers are moving beyond traditional listed portfolios into more complex product ecosystems. While these offerings can improve diversification and return potential, they also bring challenges such as liquidity constraints, opaque valuations, suitability assessments, and increased operational complexity across onboarding, reporting, and compliance. Supporting them requires modernised product and operating models. At the same time, generational wealth transfer has made digital-first engagement, transparency, values-based investing, and seamless multi-channel access to advice essential to the value proposition.

Ultimately, successful innovation in this space depends on aligning product expansion with stronger risk disclosures, advanced portfolio analytics, and scalable distribution supported by effective client education. The OLYMPIC Banking System sits at the core of banks' operations, helping institutions build resilience while responding to the evolving demands of private banking and wealth management. Through automation, instant payments, cloud-based deployments, and system integration, private banks and wealth managers can optimise costs, strengthen risk mitigation, and operate with greater efficiency and control.

At the same time, the platform remains innovation-driven, enabling advanced digital capabilities without losing the human touch essential to trusted advisory relationships. The focus is on delivering frictionless digital experiences, scaled through real-time data. Firms are increasingly combining agentic collaboration, instant KYC, embedded finance, and dynamic credit within existing platforms to enable contextual services, faster decision-making, and new revenue streams.



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