



Banca Popolare di Sondrio

PRESS RELEASE

Banca Popolare di Sondrio launches SCRIGNObussola

The new platform has been designed to improve client interaction in order to personalise and facilitate financial planning, wealth management and the achievement of personal goals

Banca Popolare di Sondrio is proud to present **SCRIGNObussola**, an innovative instrument which effectively renders our consultancy services personalisable, scalable and engaging.

SCRIGNObussola represents a breakthrough in managing bank-client relations in that it is based on the understanding of the client's personal life objectives, supporting them in their investment and savings decision-making together with risk coverage. **SCRIGNObussola** thus adopts a holistic overview in a made-to-measure product which assists the client in assessing their needs and objectives, whether it be the buying of a house, family insurance protection, child study planning or the creation of an annuity -all become tangible with adequate financial planning and insurance cover.

This new product forms part of the development process outlined in the Bank's Industrial Plan which focuses on strengthening wealth management and bank-assurance following a 'human-digital' model capable of harmonising personal relationships with innovation and technology.

SCRIGNObussola is available in two formats which complement each other. The first is accessible via the bank website **SCRIGNObps** and allows the client to explore in complete autonomy the various financial and insurance options relevant to their own personal needs. This is done following an interactive educational route which ultimately leads to the creation of a personalised financial/assurance profile and the opportunity to carry out an initial check on the sustainability of the client's choices.

Financial education today forms the basis of informed choice and awareness, and to this end, the online version of **SCRIGNObussola** provides guidance through simulations and fundamental advice.

The second format is available to branch consultants to assist them in helping the client with financial planning and finding effective cover via technically advanced simulations

together with a dedicated dashboard which constantly monitors the choices made in the overall context of the desired objectives.

The system has been designed to offer maximum transparency, simplicity of use and is fully compliant with current legislation. Each plan can be updated in time to adapt to changes in life situations, market conditions or the client's changing priorities

Milo Gusmeroli, deputy general manager of the Banca Popolare di Sondrio, commented: *"SCRIGNObussola marks an important step towards modern client-based consultancy centred around the client's financial resources and competence without omitting risk coverage. The project stems from a clear concept: assist the client in achieving goals thanks to a technologically advanced yet accessible system capable of highlighting the value of our local consultants"*

Barbara Martinelli, Bancassicurazione Manager confirmed *"Blending financial and insurance consultancy underlines the added value of insurance cover and illustrates how risk protection can significantly improve the possibility of reaching one's life goals."*

Graziano Bugatti, CEO of Mind Over Money, project tech-partner, commented: *"It has been a pleasure to collaborate with the Banca Popolare di Sondrio on this project. The Bank represents a solid reality with deep roots in the community and has always been actively open to innovation. SCRIGNObussola is the concrete result of this vision, a vision which combines tradition with digital transformation."*

Banca Popolare di Sondrio thus confirms its commitment to rendering consultancy more simple, effective and personalised by investing in solutions capable of harmonising tradition and technology while listening to the communities we serve.

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Company Contacts:

Public Relations

Giuseppina Bartesaghi

0342-528.467

mina.bartesaghi@popso.it

Image Building

Cristina Fossati,

Denise Recchiuto

02-890.11.300

popso@imagebuilding.it