

Manual for setting up your profile

Version August 2019

This guide will help you set up your account with the Swiss Finance + Technology Association at www.swissfinte.ch. The manual covers all steps necessary for an

1. Individual Membership
2. Startup, Investor, or Company Subscription
3. Partner Profile

	Member	Subscriber	Partner
Create a profile	Yes	Yes	Yes
Visit the Directory and see profiles	Yes	Yes	Yes
View Deals	Yes	Yes	Yes
Post events		Yes	Yes
List company offer in Marketplace		Yes	Yes

Tips for getting the most from your account	3
Getting Started – general	3
Subscriber and Partner Profiles	6
Posting Events	9
Posting Jobs	10
Access the Talent Pool	11
How to recover your password	11

Tips for getting the most from your account

With these 5 steps you can get the most from our network:

1. Use the membership works on a regular basis and keep it up to date.
2. Read our articles, join our LinkedIn discussions and come to our events.
3. Make sure you use our twitter (@finnovation) handle and post your activity with us.
4. Become a volunteer and contribute through content.
5. Become a subject matter expert and lead the discussion with our working groups.

Getting Started – general

Step 1: Scroll down + add your details:

Account name	<input type="text" value="Full name or company name"/>
Contact name	<input type="text" value="Full name"/>
Position	<input type="text"/>
Address	<input type="text"/>
	<input type="text" value="City, state/province, postal code"/>
Email	<input type="text" value="Required"/>
Phone	<input type="text"/>
Website	<input type="text"/>

Step 2: Select Relevant Package

Individual membership
Please note, only individuals may register as members. We offer subscriptions for startups, investors, companies, and partners.

Student membership
This applies to active students who can provide a valid ID with expiration date listed. Email a copy to info@swissfinte.ch to ensure your membership is approved quickly.

Startup
This option applies to any companies which are under 5 years old. Swiss-based companies in their first year of existence qualify for half-off the price of subscription.

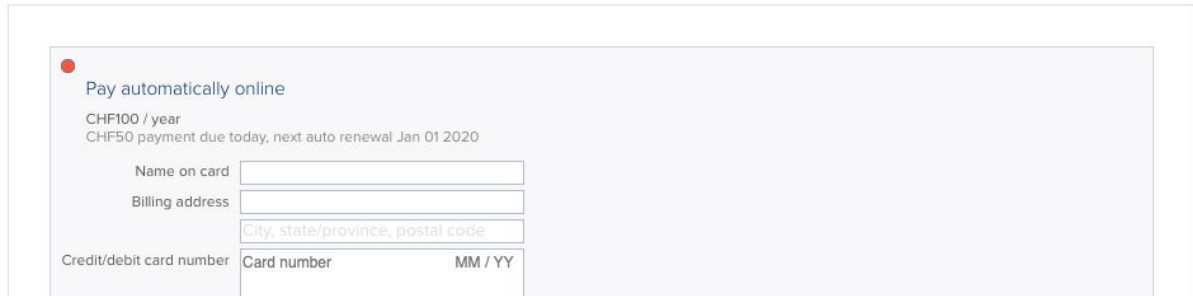
Investor
This option applies to any investors such as angel groups, venture capital funds, and others who actively invest or manage investments.

Company (small)
This option applies to any companies which have been in operation for over three years and under 50 employees.

Company (large)
This option applies to any companies which have been in operation for over three years and over 50 employees.

Step 3: Input payment details

- Subscribers have option to be invoiced annually



Pay automatically online
CHF100 / year
CHF50 payment due today, next auto renewal Jan 01 2020

Name on card

Billing address

City, state/province, postal code

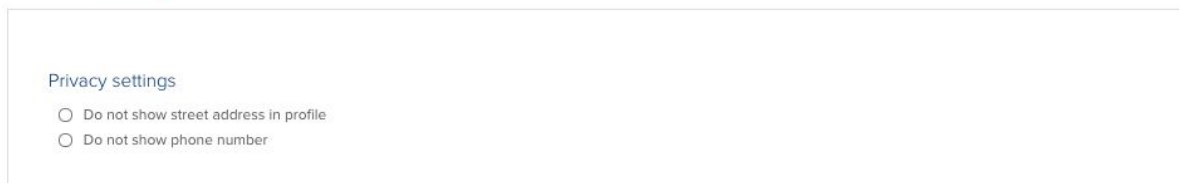
Credit/debit card number Card number MM / YY

Step 4: Click “Join now!”

Join now!

Optional: Set Privacy Setting

Account **Profile** Contacts Offer Gallery



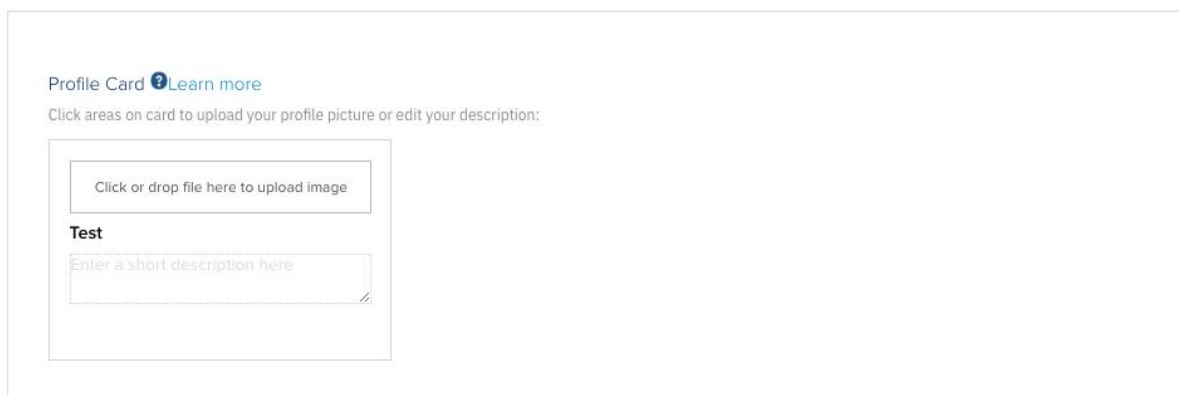
Privacy settings

Do not show street address in profile

Do not show phone number

Step 5: Add a visual

- Individual members: please add a profile picture
- Subscribers & Partners: please add your logo



Profile Card [Learn more](#)

Click areas on card to upload your profile picture or edit your description:

Click or drop file here to upload image

Test

Enter a short description here

Step 6: Add your description

- Individual members: please describe yourself and your background

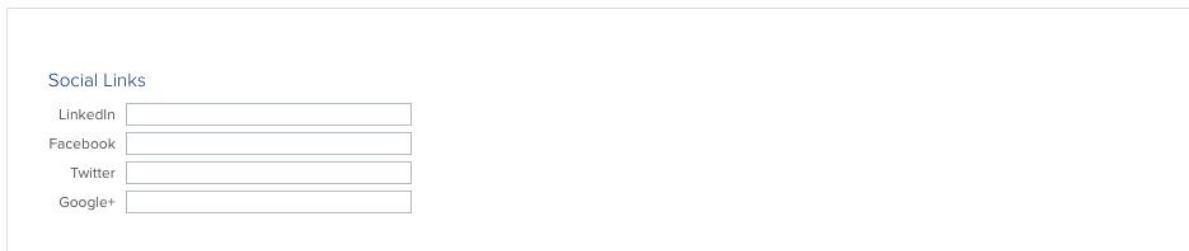
- Subscribers & Partners: please add your company description



Profile Description [? Learn more](#)
Describe your products & services:

Edit ▾  **B** *I* U      

Step 7: Add Social Media so we can communicate and promote your organisation



Social Links

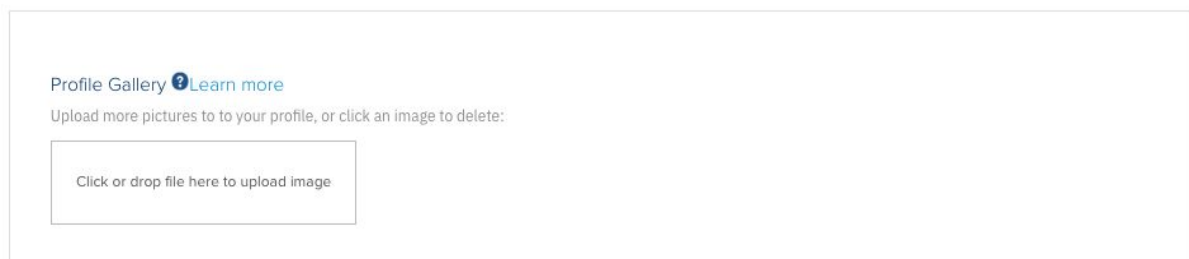
LinkedIn

Facebook

Twitter

Google+

Step 8: You can add additional personal or, for Subscribers and Partners only, company photos in the Photo Gallery



Profile Gallery [? Learn more](#)
Upload more pictures to to your profile, or click an image to delete:

Step 9a: Members-only, select your preference for being visible to companies in the Talent Pool.

Step 9b: Subscribers-only, select your category (startup options shown below)

What type of startup are you?

Please indicate which category best describes your startup.

- Startup - Banking
- Startup - Crypto
- Startup - InsurTech
- Startup - Invest & Asset Management
- Startup - Lending
- Startup - Other
- Startup - Payment
- Startup - RegTech
- Startup - Security
- Startup - Social / Ethical

Step 10: Save you profile

✔ Save & Continue

Subscriber and Partner Profiles

Step 11: Add the contacts you want to share under your account

Account Profile **Contacts** Offer Gallery

Manage contacts

Use this area to add specific contacts from within your organisation.

+ Add New Contact

✔ Save & Continue

Step 12: Subscribers and Partners can add the service offer to the [Marketplace](#)

Account Profile Contacts **Offer** Gallery

Offer

Use this area to list special offers to the community.

Upload a main image (or click on existing image to replace) and enter the title below:

Click or drop file here to upload image

Title

Title layout:
Normal

Enter the description and details below:

Optional: Add a barcode, QR code or other image:

Click or drop file here to upload image

Step 13: Click Create and then Save & Continue

Create

✔ Save & Continue

Step 14: Check the listing in the [Marketplace](#)

Our Marketplace


I am text block. Click edit button to change this text. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ut elit tellus, luctus nec ullamcorper mattis, pulvinar dapibus leo.

 Search

Startup Weekend Fintech Geneva deals

Startup Weekend Fintech Geneva (non-profit)

Hello, stay tuned for deals offered to the SFTA community!



SRA events

Swiss Risk Association

In 2017 we plan 30 EVENTS for you - please find our event calendar here...



INVOICE FACTORING

Asociación Española de Fintech Insurtech

Scope : fully automated process for invoice factoring: invoice capturing,...



UNIGE - Fintech Executive Education...

UNIGE - Fintech Executive Education Program

INTRODUCTION
Financial Technology (fintech) industry is expanding quickly...



Invitation



Step 15: Add a link to your company video. Need one? Ask us about scheduling time to film an interview of elevator pitch you can add to your profile

- Account
- Profile
- Contacts
- Offer
- Gallery

Videos

Add links to any company videos here, such as:

- Elevate pitch
- "First Meeting" style interview
- Demos and tutorials

+ Add Link

✔ Save & Continue

This is all you need to set-up your account.

Posting Events

This is only available for Subscribers and Partners.

Step 1: Go to the [Events Calendar](#) and click “[Submit Events](#)”

Submit your event or an event you think should be on the list.

Member and subscribers can directly upload relevant events to the ecosystem event list, otherwise, **please email us.**

Event Setup

Event category:

Event title:

Start: display as:

End: display as:

Place/location:

Event address:

Click or drop file here to upload image

Format - Edit -

Click here to edit the description and details of your event

Save & Continue

Step 2: Click “Save & Continue to finalise the event details”.

Step 3: Your event will appear in the [Event Calendar](#) once approved by the team. If

by our team. If you have not heard from us, contact info@swissfinte.ch.

Access the Talent Pool

This is only available for Subscribers and Partners.







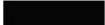


Step 1: Go to the Talent Pool Page. Subscribers and Partners will be able to view the profiles. If not, contact info@swissfinte.ch.

Looking for talent to join your team?

[Post jobs](#) [Hire Interns](#)

[administrator notice: content below memberonly label="Startups,Investors,Companies"]

Search for... [Search](#) [Categories](#) ▾

 <p>Andrew Casey Corporate Venturing for Fidelity Investments - strategic partners and investments</p>	 <p>Barbara Ruebel Brand Consultant -helping you bring your brand to life internally and externally</p>	 <p>Christian Jedlicka wealthtech expert: strategy, product management, business development</p>
 <p>Dirk Steller Founder / Managing Partner , Seed Space Venture Capital</p>	 <p>Dorian Credé Founder of Wikirating</p>	 <p>Dr. Simon Alioth Associate Partner Head Open Banking at Synpulse Management Consulting</p>
 <p>Gabriel Lamon</p>	 <p>Georgi</p>	 <p>German Ramirez</p>

Step 2: Contact any members whose profile you are interested in for a role with your organisation.

How to recover your password

Step 1: Find the account icon on the top right hand side of www.swissfinte.ch to “[manage my account](#)”.



The Association ▾

What We Do ▾

Insights ▾

Events ▾



Step 2: Select “Request new password” and provide the email address associated with the account. If you have difficulty, contact info@swissfinte.ch.

My Account

[Home](#) » [My Account](#)

Manage my account

- Sign In
with your email and password.
- Request Password
We will email you a new password so you can access your account.

Email

[Request Password](#)