



Building the future of finance, today

Hello there!



Simon Bentholt Hansen
CCO & Founder



Christian Bergmann Mølgaard
Head of External Relations

Dreamplan.io at glance



Our Organisation

30 employees, 4 countries
3y under license from FCA



Wizflow platform

1.3M CPR processed/4 clients
Built-in compliance



Proven delivery model

4 weeks to install
Fast-track rollout



Strong team & leadership

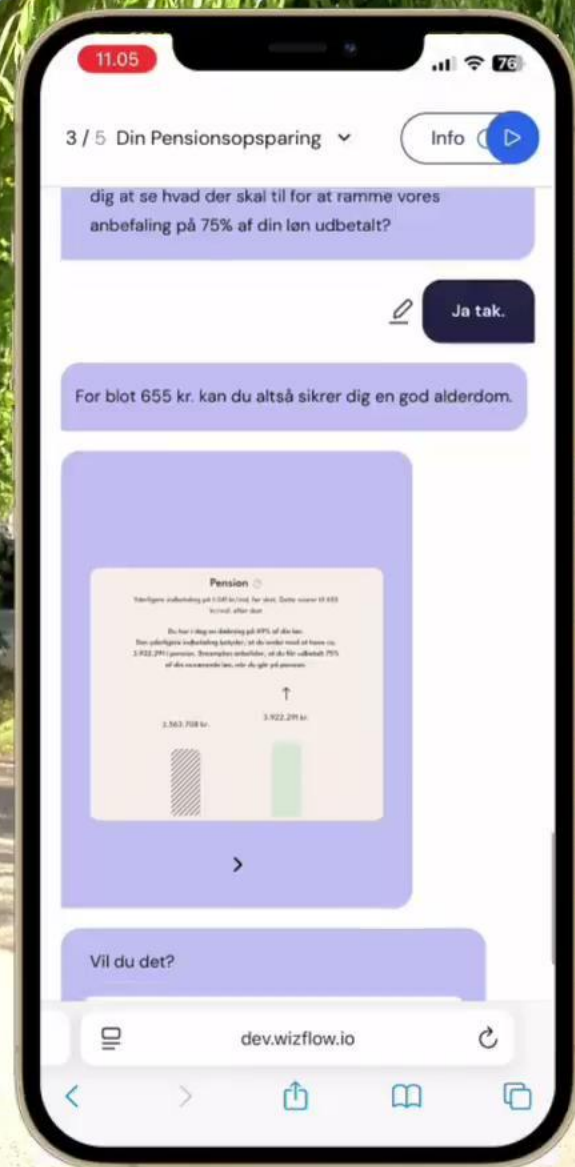
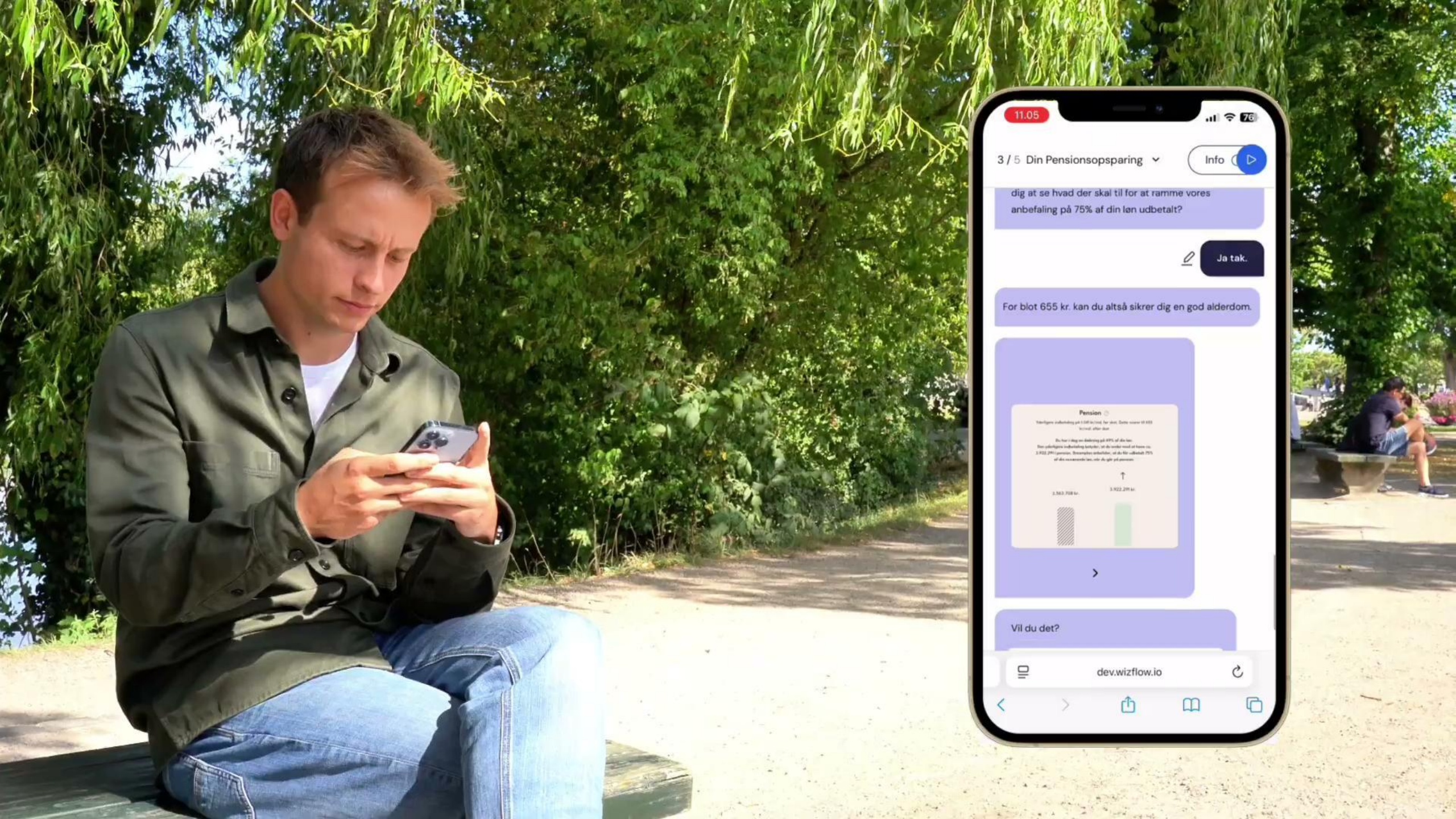
Proven digital experts
Fit & Proper certified



How it started...

How can we create human-friendly,
future-proof customer journeys...

**...without compromising on
speed, security or compliance?**



[Your Result](#)[Your dreams](#)[Your Informations](#) [v](#)[Contact](#)[Simon](#)[Log out](#)

Your Dreamplan

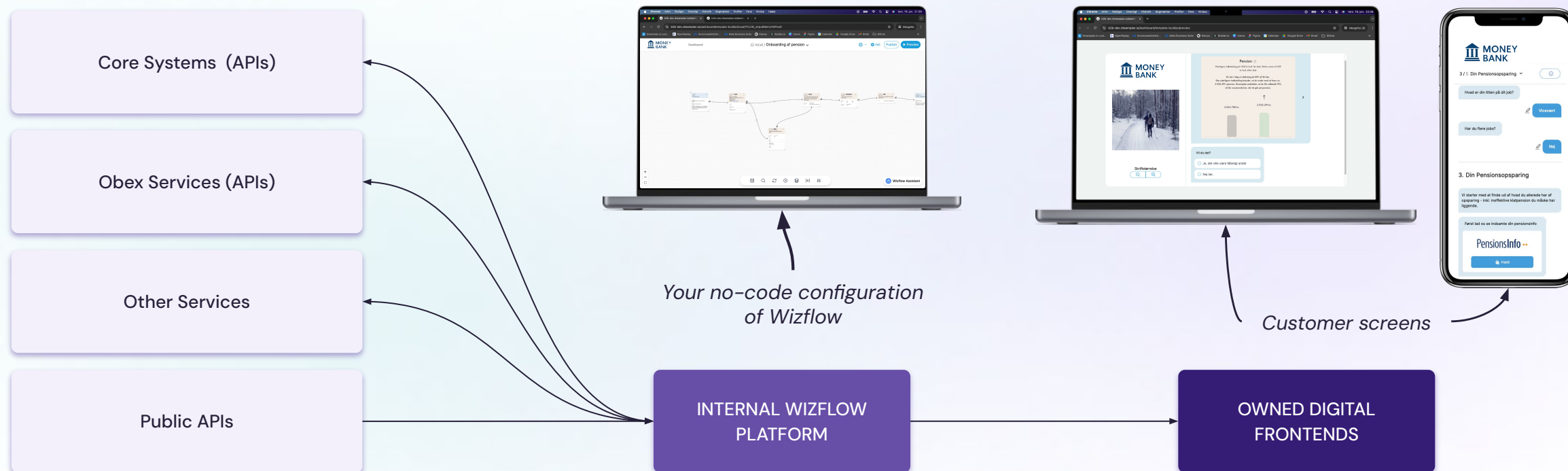
Optimise your savings

[↺ Recalculate](#)[📅 Book a counselling session](#)

Dreamplan calculates that your wealth can increase by up to:

+DKK 1,862,963

Seamlessly connect advisory, services & sales



Let's demo

4 different AI's assist flow generation



Build my Flow

Let the AI deliver an 80% ready-made solution based on prompts.



Build my Frontend

Prompt the AI to build the specific custom elements you need.



Build my Variables

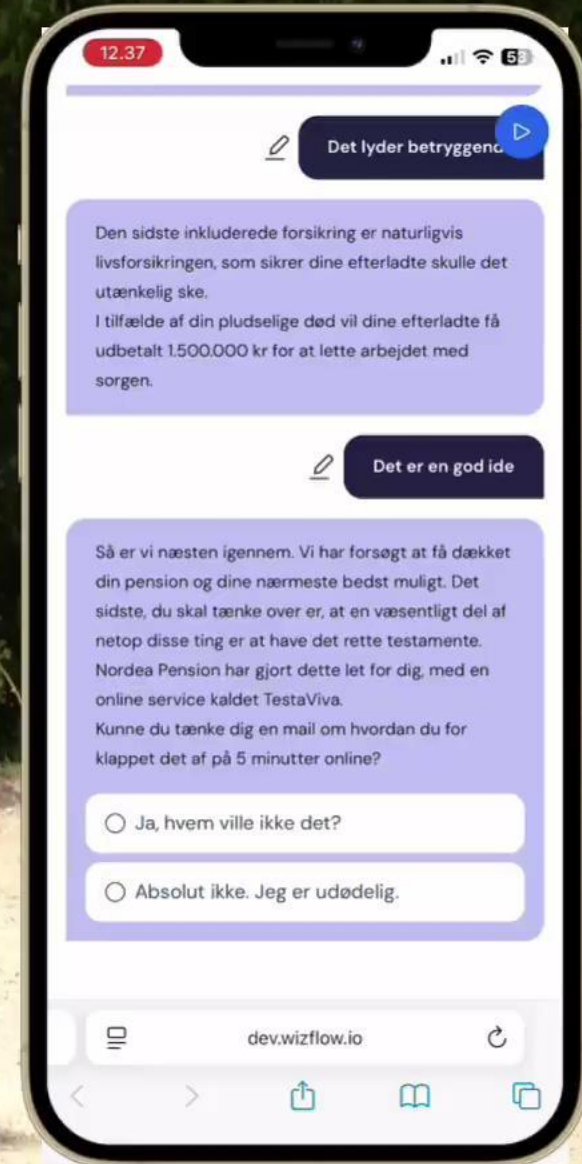
Create advanced computation of data collected in your flows.



Check my Data

AI assist in accuracy and compliance in financial calculations.

...so let's build an onboarding
flow for pension



Selected standard features



Access & Governance

Role management
Compliance lock up
Full audit logging transparency



Logic & Processing

Calculation engine
Rules engine
Automated testing



Data & Approvals

Data storage
Analytics
Approval flows



Integrations & Localisation

Wrap & E-sign (162 countries)
Full localisation & language control
Integr: e-skat, CVR, MitID, DAWA, PensionInfo verifi

Security & Compliance

- Wizflow is ISO 27001 documented and GDPR aligned.
- Provides full audit trail, rollback, and version control — essential for regulated workflows.
- Client-side implementation, via Docker or private cloud, keeps data under your control.
- Role-based access and environment-level governance enable secure collaboration.





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