

## wealth management functional data sheet

focus:360° wealth management provides an integrated suite of tools that enable organisations to deliver a proactive, client centric, wealth management service. It includes a breadth of functionality encompassing point of sale, sales support and back office and can operate across all distribution channels, both online and offline to support the holistic financial planning process.

### product features

- business opportunity generation
  - lead management
  - wealth alert generation
- advice/sales process
  - document generation
  - agenda setting
  - client objective management
  - personal fact find
  - corporate fact find
  - trust fact find
  - charities fact find
  - case document management
  - central document library
  - attitude to risk questionnaire
  - asset allocation
  - investment needs analysis
  - pensions needs analysis
  - protection needs analysis
  - IHT needs analysis
  - model portfolio selection
  - portfolio rebalancing
  - quote management
  - Assureweb TPI quote integration
  - Assureweb Ape quote integration
  - needs and recommendation process
  - anti-money laundering capture
  - suitability letter generation
  - case submission
  - case notes management
  - holistic 'what if' based financial planning
- single client view
  - client details and provision summary
  - contact management
  - outlook integration
  - portfolio valuation
  - financial summary
  - objective performance review
  - sector analysis
  - financial history
  - Financial Express price feeds and x-ray feeds
- client relationship management
  - wealth alerts generation
  - mail merge export
  - client information portal support
  - annual report
  - sector analysis
  - client holding review
- distribution management tools
  - case checking
  - training & competency
  - TestMeOnline content
  - new business processing
  - management information
  - task management
  - remuneration management
  - commission EDI feeds
  - agency management

### technology

- web browser based .NET2 solution
- scaleable SOA architecture
- enterprise security
- SQL server 2005 database platform
- on/offline deployment

## non functional features

- highly configurable
- flexible look and feel
- autosave