



Given the challenging nature of current investment markets, clients are demanding more of their advisers and wealth managers. At the same time firms working in this market are facing greater competition as more organisations look to service the needs of High Net Worth Individuals (HNWIs) in an attempt to generate more profitable business.

In light of these industry factors, you could be facing numerous issues and opportunities such as how to:

- scale your business
- provide clients with goal and liability driven planning services
- build stronger and deeper client relationships to grow customer loyalty and increase revenue
- develop a consistent quality of service, regardless of adviser
- reduce administrative overheads across all areas of your operations

**focus:** 360° wealth management can help you build, develop and retain your client base by providing the tools to deliver outstanding customer service and minimise administrative processes.

we believe that wealth management firms that haven't yet introduced platform technology to their business will increasingly find themselves struggling to keep up with their peers and competitors.

The Wealth Management report – JP Morgan Asset Management, Jan 09

## benefits of **focus:360°** wealth management

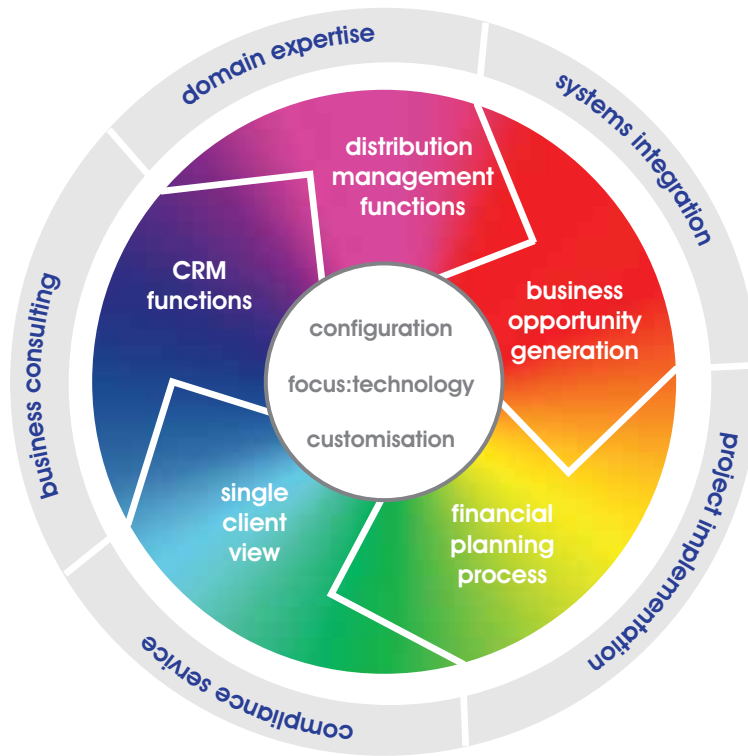
**focus:360°** wealth management can help you to:

- **save time and allow advisers to service more clients through:**
  - automated production of suitability letters and financial reports
  - on-line trading, portfolio valuations and annual reviews
  - elimination of re-keying of data
- **improve compliance and minimise compensation payments through:**
  - automated production of suitability letters and financial reports
  - on-line trading, portfolio valuations and annual reviews
  - elimination of re-keying of data
- **reduce operational costs through:**
  - automated commission / fee management and reconciliation
  - reduced cost of training advisers and maintaining competency
  - quicker introduction of new channels to market e.g. telephone sales
- **increase sales and revenue through:**
  - alert based client management
  - cross-sales identification via goal / liability based planning
  - improved lead tracking and management
- **enhance quality of customer service through:**
  - on-line tracking of profiles
  - sophisticated client facing documentation
  - increased speed of service
- **improve cash-flow through reduced time to policy**
- **reduce IT costs through streamlined IT architecture and rationalisation of disparate systems**
- **enhance image and reputation**

the team at Focus has been great to work with throughout our project with their flexibility, responsiveness and most importantly their extensive expertise. We have been impressed with their wealth management solution and its ability to evolve with our organisation, and we see it as key to our business plan moving forward.

Sue Guest, Operations Director, Towergate

## the 360° service



## underlying technology features

- browser based
- available online and offline
- database agnostic
- Service Oriented Architecture
- XML based tool-kit for easy configuration
- multi-currency / multi-language



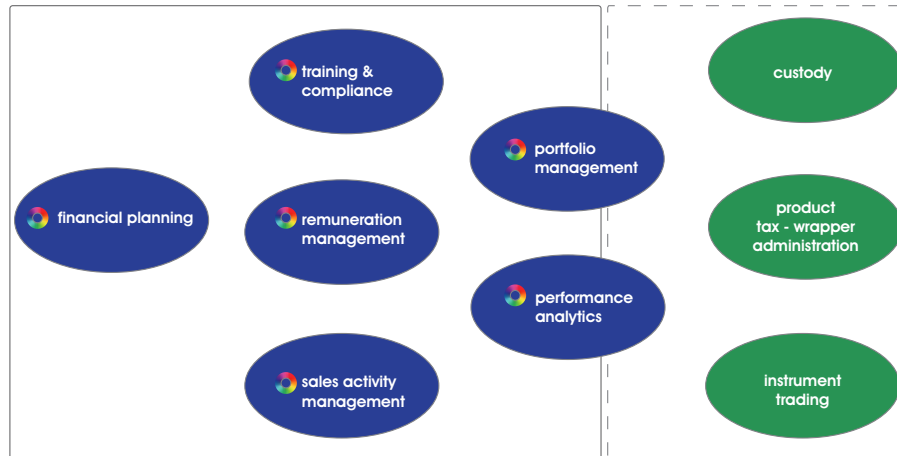
## what is **focus:360°** wealth management?

**focus:360°** wealth management is an application offering a wide range of functionality to support the demands of HNWIs and affluent clients. It provides an integrated suite of tools that enable organisations to deliver a pro-active, client centric, wealth management service. Designed for use by IFAs, wealth managers and private client divisions of banks, **focus:360°** wealth management transforms the advice process, reduces administration and radically improves the quality of service delivered to clients.

## **focus:360°** wealth management has been developed for:

- **private client wealth managers** that handle wealth management tasks such as client engagement, CRM, financial planning and portfolio construction but already have systems that support portfolio management and performance reporting.
- **private client divisions of retail banks and IFAs** who are looking for a comprehensive range of wealth management functions including portfolio management and performance reporting and currently use retail banking systems for client account management.

### market positioning



key ■ focus:360° ■ 3rd party



## about focus

Focus Solutions is a leading provider of software and consultancy services to the financial services industry. We enable our clients to automate the delivery of products and services to their customers across multiple distribution channels in a rapid and efficient manner.

We achieve this through a combination of:

- agile software products
- in-depth expertise in the regulated financial services market
- proven project delivery

Our market leading products support a variety of sales automation projects ranging from multi-channel implementations to individual point of sale solutions. Designed to be flexible to respond to the ever changing regulated financial services market, the **focus:360°** product suite has been chosen by leading bancassurers, product providers, mortgage lenders, wealth managers and major distributor firms.

## why work with focus?

- specialised consulting services which provide access to a wealth of industry knowledge, experience and insight through real-world practitioners.
- powerful training and competency capabilities, including classroom training, online training and online assessment.
- proven project delivery with over 75 complex multi-channel implementation projects with several integration points successfully completed for a blue chip client base.
- experience of supporting systems that are utilised by 1000s of internal staff across multiple locations.
- industry thought leaders who publish whitepapers on latest market trends, comment in trade publications and speak at high profile events.



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