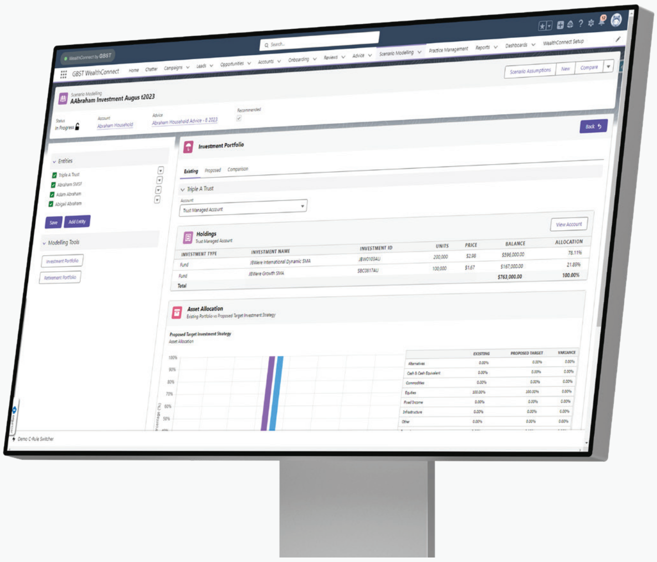
WealthConnect Professional



Empower your advisers, elevate your business.

WealthConnect offers unparalleled flexibility to structure your business needs, advice processes, wealth management, and client engagement powered by Salesforce CRM technology.

WealthConnect is a comprehensive digital solution that simplifies client administration, practice management, and wealth management. It centralises all data, to deliver a single source of truth eliminating the need for multiple systems. Built on Salesforce technology, the software has flexibility and advanced functionality to meet your business needs and prioritise client experience and engagement.

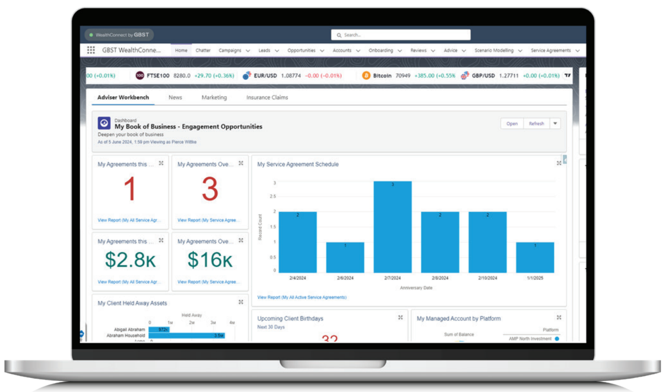
Designed to align with the way your business functions, WealthConnect can be easily customised to incorporate your business and process needs. It doesn't impose specific business process workflows or require you to adapt to fit the system; instead, it's built to work how you want it to. The software has been deliberately developed with a neutral approach, ensuring it remains agnostic and flexible for your business.

WealthConnect offers seamless integration with existing software and tools, ensuring a smooth transition and minimal disruption to your operations and client book.

Highlights

Experience a new level of productivity, efficiency, and collaboration for your advice business.

This powerful solution is designed to help advisers dedicate more time to activities that add value and improve the client experience.



Leveraging cutting-edge Salesforce technology, WealthConnect includes all the essential CRM components you need to store, track, and analyse client and prospect information – all in one central location. It facilitates collaboration on contact and account information, sales opportunities, and marketing campaigns for your team.

With WealthConnect, you can manage the entire client lifecycle with ease. It enhances every stage of interaction from marketing and lead generation to onboarding, financial advice, service management, compliance, and portfolio administration. The comprehensive system helps increase productivity by enabling informed decision-making and delivering engaging client interactions.

WealthConnect Professional

Enhance your advice and wealth management to streamline operations, ensure compliance, and deliver exceptional client service.

Features

Scenario modelling

Deliver comprehensive financial insights, enabling you to create cash flow, taxation, and net worth projections across a client's entire portfolio. You can generate and compare multiple scenarios, with seamless integration back into the Advice Wizard, to visualize future client positions and outcomes.

Portfolio tool

- Manage model portfolios, SMA/MDAs and unlisted assets
- Rebalance existing model portfolios
- Buy/sell investments with ease

Cash flow and projections

- Project your clients cash flow and net worth
- Perform retirement needs analysis
- Calculate taxation for current and future years

Client management

Manage client delivery in one comprehensive solution that streamlines the entire advice lifecycle.

Document generation

Use your data stored on the platform to easily create documents, forms, or bulk communications with just one click.

Service agreements and delivery

Supports all types of service agreements, including fixed term, one-off and ongoing services. Manage your service delivery and renewal compliance obligations. Standardise or allow your advisers to customise based on types of agreements for your segments or service offerings.

Business management

Streamline business processes and workflows on a single platform. Benefit from dynamic and simplified task management, automated time tracking, and decision pathways.

Activity management

Create loops, options, and close-off points instead of linear steps in your process. This includes conditional and pathway workflows. Build business and activity management journeys the way they already exist in the business.

Document management

Automate document creation using Conga Document Control capability, centrally manage your documents, store templates and provide one-click document generation to enhance and speed up advice execution.

Advice creation

Wizards provide a pathway through the advice process, from onboarding to financial strategy and review. Use best practice guardrails to bring your business processes to life, creating activity and compliance efficiencies.

Review wizard

Use one or many wizards based on your segmentation, client engagement type, or business process.

Advice wizard

Use the wizard based on your advice interaction. Capture your key milestones and add preventative controls to reduce compliance risk.

Risk and compliance

Set up guardrails using WealthConnect's in-line compliance rules engine, utilise an embedded approval process, track key dates, and effortlessly generate comprehensive reports with drag-and-drop functionality.

About GBST

GBST delivers technology and digital solutions to enable, support, and scale wealth management and advice organisations globally. Our team of experienced professionals create vital back, middle, and front-office solutions for wealth managers, life and pension companies, stockbrokers, fund managers, advisers, and investment managers, as well as offer financial tools and digital services to banks and loan providers. Founded in 1983, GBST works with more than 100 financial brands across Europe, Australia, New Zealand, the US, Canada, and the UAE. Our leading-edge technology supports over 5.5 million investor accounts under administration with Direct to Consumer, Advised and Workplace channel solutions.

Contact us for more information or to arrange a demonstration.

info@gbst.com | +61 2 9253 6555

www.gbst.com

06/24