_experience the commitment™

CGI

MPlan for Financial Planners

FEATURES

- Client-centered financial planning suite
- Save/Archive multiple sessions
- Personalized advisor center adds personal touch to reports
- Broad range of planning tools covering investments, retirement, borrowing, goal-setting, needs analysis and strategy comparison
- Online/Offline capabilities
- White labelled – customize with your company branding and preferences

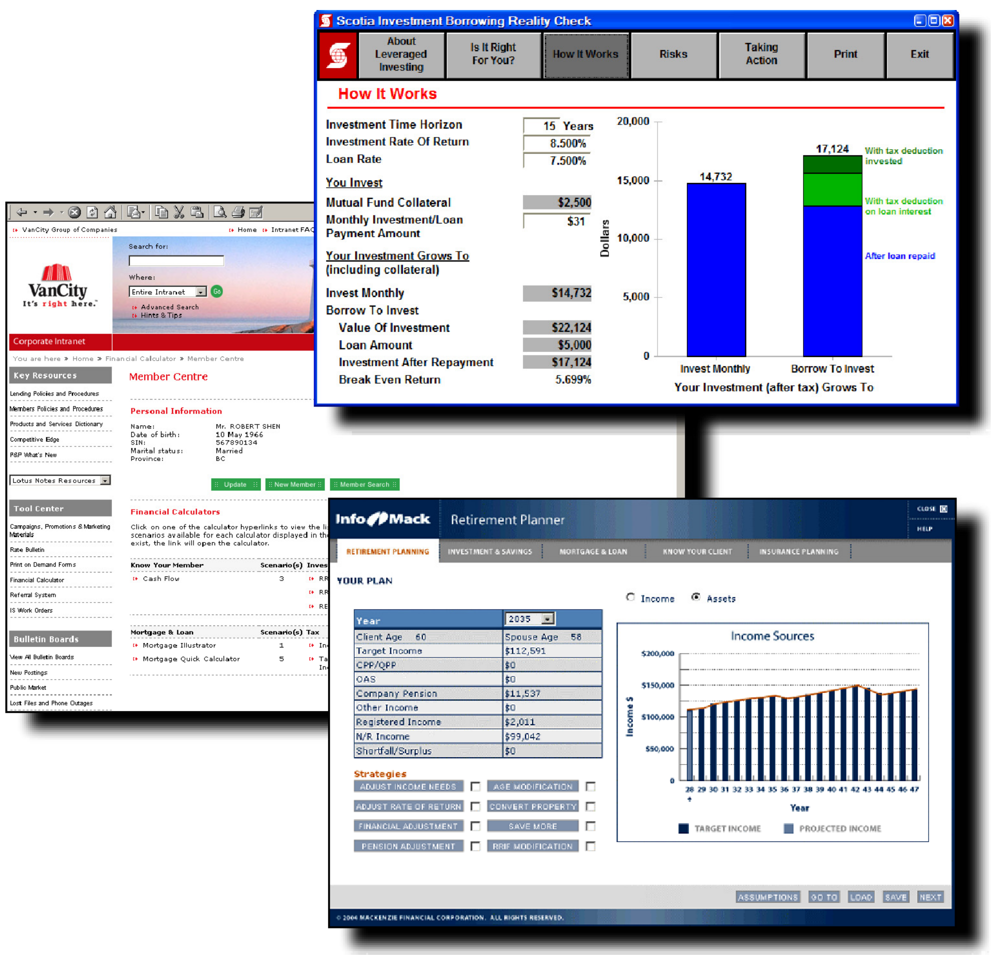
BENEFITS

- Build your own customized suite of tools from a choice of over 30 calculators
- Provides a platform to ensure consistent advice is offered companywide
- Export data to external systems
- Web-based - can be accessed from anywhere
- Individual calculators tied to a common centralized client hub

CUSTOMIZED FINANCIAL PLANNING HUB

MPlan is a centralized, flexible financial planning hub that provides the means to generate sales leads, convert prospects to clients and draw additional revenue from existing clients.

Whether deployed on your public website, or through your company intranet as an advisor toolkit, MPlan has the breadth of functionality to tailor your suite to meet the financial planning requirements of your organization.



KEEPING YOU AHEAD OF THE INDUSTRY

Architecture

- Browser based, J2EE web application
- Central database server for shared information access
- Single sign on with authentication system
- HTML/PDF/RTF-Reports
- Web services integration

Features

- Suite incorporates both calculators and sales methodology to allow both the salesperson and client to understand the impact of financial decisions
- Allows clients to create a comprehensive financial plan or develop a plan in stages, using the components that are relevant to them at their particular life stage
- Helps client to explore cash flow, investing and borrowing while providing the financial institution with a seamless delivery approach
- Developed for deployment across all delivery channels (e.g., branch desktop, mobile sales force, public website, secure website)
- Tools are “white labeled” for clients to reflect the corporate marketing image

System Environment

Connection

- Internet/Intranet/Extranet

Application Server Operating System

- Windows and Unix

Database Supported

- MS SQL 2000 (SP 2)

COMPANY PROFILE

At CGI, we’re in the business of satisfying clients by helping them win and grow. For more than 30 years, we’ve operated upon the principles of sharing in clients’ challenges and delivering quality services to address them.

As a leading IT and business process services provider, CGI has a strong base of 31,000 professionals operating in more than 125 offices worldwide, giving us the competitive advantage of close proximity to our clients. Through these offices, we offer local partnerships and a balanced blend of global delivery options to ensure clients receive the optimal combination of value and expertise required for their success.

We define success by helping our clients achieve superior performance and gain competitive advantage.