



# CGI Wealth360

## Digital Wealth Platform Overview

EXPLORE →



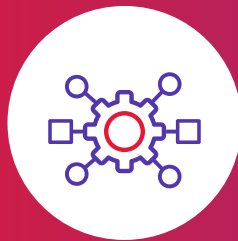
# CGI at a glance

## Our approach is what sets us apart

CGI is among the largest IT and business consulting services firms in the world. We are insights-driven and outcomes-based to help accelerate returns on your investments.



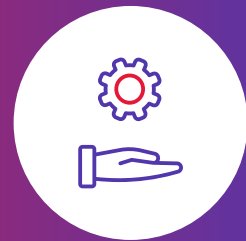
IT and business  
consulting



IT and business  
process outsourcing



Systems  
integration



170+ software  
solutions

Founded in  
**1976**

**9.3/10**

Client satisfaction score

**\$12.87B**

Revenue in \$USD

**9.0/10**

Client innovation score

**400**

Office locations in 40 countries

**90,000+**

Consultants and professionals worldwide

**50,000**

Clients served using our software solutions

**17**

Countries worldwide

Offices in

**Sydney, Brisbane,  
Melbourne, Hobart and  
Adelaide**

**5,500**

Clients benefiting our end-to-end services

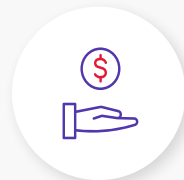
# Delivering innovation, value and results across financial services

18,000

Banking and insurance professionals

500+

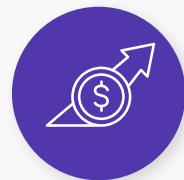
Banking clients



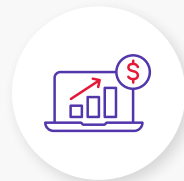
Retail banking



Corporate and transaction banking



**Wealth Management**



Capital markets



Payments

# Leading Platforms for Global Wealth Management

## End-to-end Solution Suite

Delivered through five distinctive platforms

Digital Wealth  
Platform

Fund  
Accounting

Funds 360

Tax  
Administration

Brokerage  
Processing

40+

years of experience

\$1.8T+

total assets serviced

1,300+

wealth professionals

35+

Financial institutions in North America



# CGI Wealth360

## Digital WealthPlatform

### Leading front office wealth platform

**CGI Wealth360's Digital Wealth Platform (DWP) delivers a flexible unified account platform to empower firms to attract, retain and grow their business.**

DWP enables advisors with the ability to deliver next generation investment decisions aligned with client objectives, across various markets scenarios-increasing the accessibility, transparency, and personalization to win in today's increasingly competitive marketplace.



Real time practice insights



Optimized tax management capabilities



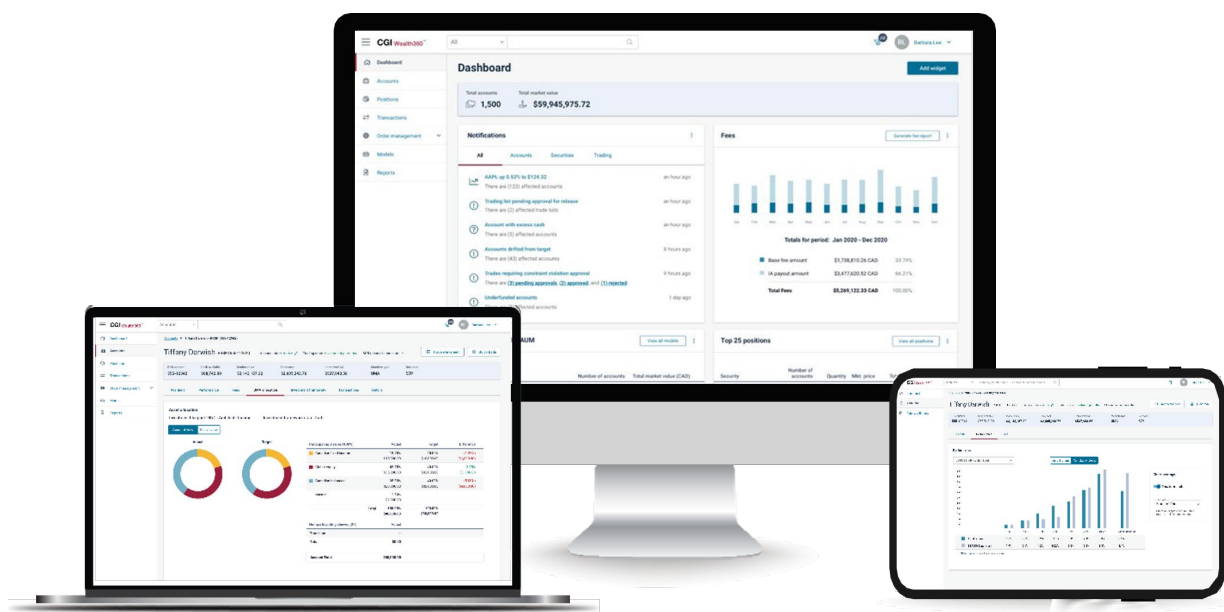
Intuitive and scalable portfolio management



Sophisticated goal tracking and reporting



Client-centric custom reporting



Unified Account Advisory Platform  
Attract. Retain. Grow.

Advisor experience | Client experience Portfolio management | Digital tools



# DWP overview

Wealth360 Digital Wealth Platform delivers leading goals-based investing capabilities and provides end-to-end investment management support to enable scalable personalization across a wide variety of management styles:

- Separately managed accounts (SMA), unified managed account (UMA)
- Unified managed households (UMH)
- Rep-as-a-PM



## Advisor dashboard and workflow

Modern workstation to retain current advisors and attract the next generation.

- ✓ Clean, bold visual aesthetics, customizable to your branding, with native mobile access for advisors.
- ✓ Definable “robo-like” automated workflows to actively guide prudent advisor behavior.
- ✓ Configurable widget-based interface, with the ability to arrange how widgets such as alerts are presented.



## Model management, rebalancing and trading

Intuitive and automated scaling to manage thousands of portfolios.

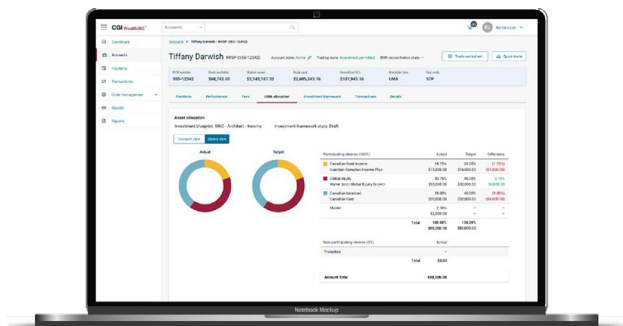
- ✓ Automatic drift alerting and tax aware trading recommendations.
- ✓ Customizable investment constraints and operational processes.
- ✓ Real-time block trading, rapid exception cleanup and other advanced trading tools.



## Product selection

Experiential investment planning that drives compliance with regulatory standards.

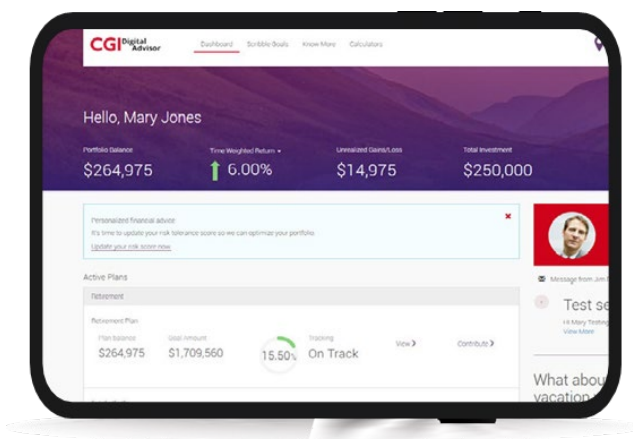
- Approved product list standards, including fiduciary compliance.
- Goal-based investment planning to support demonstration of client “best interest.”
- Modern, graphical presentation to ease communication with clients.



## Digital “Robo” solutions

Full spectrum of tools for digital advisor empowerment through investor-directed solutions.

- Configurable step-by-step workflows for on-boarding and servicing.
- Automation of re-balancing, servicing and other administrative actions.
- Modern, streamlined investor- and advisor-facing interfaces.



## Compliance and audit

Systematic surveillance and enforcement of prudent investing practices.

- Central operations mandated guardrails such as permissible drift for advisor activities.
- Keystroke-by-keystroke user-specific action logging with searchable audit trail.
- Automatic, ongoing system monitoring for violations, including pre- & post-trade checks.



Business success is not just about where you will go and how you will get there. It is also about who you will team with. We are committed to making our story about you and your successful journey, serving as an insightful and resourceful partner.

---

## About CGI

### Insights you can act on

Founded in 1976, CGI is among the largest IT and business consulting services firms in the world.

We are insights-driven and outcomes-based to help accelerate returns on your investments. Across hundreds of locations worldwide, we provide comprehensive, scalable and sustainable IT and business consulting services that are informed globally and delivered locally

### Please contact:

Davinder Oberoi  
Director, Consulting Services, CGI  
Banking and Financial Services | Australia  
[davinder.oberoi@cgi.com](mailto:davinder.oberoi@cgi.com)

[cgi.com/au](https://cgi.com/au)

© 2023 CGI Inc.

