

CGI Wealth360™

Asset Allocation

To better manage client expectations and add value, advisors must understand that each investor has a unique set of investment objectives for achieving their financial goals. Through a specialized toolset and interactive user experience, CGI Wealth360™ enables advisors to effectively gain and apply this understanding, resulting in improved client acquisition and retention and an increased book of business.

Through the use of tools such as risk profiling, Monte Carlo simulations, alternative investment scenarios, historical back-testing, and strategy comparisons, an advisor can demonstrate how to best align a client's goals, risk tolerance, and investments. CGI Wealth360 assists advisors in formulating suitable asset allocation recommendations through interactive, illustrative and easy-to-use functionality. Efficient asset allocations are then generated to ensure a well-diversified portfolio is achieved.

CGI's Wealth360 enables advisors to more effectively perform the following functions to drive better results for their clients and business:

COLLABORATE

Work closely with clients to determine and understand their unique financial circumstances, along with their individual financial acumen and risk tolerance. Through the use of illustrative tools such as a configurable questionnaire, current holdings assessment, and the flexibility to capture notes pertaining to specific areas during any meeting, advisors can easily educate clients and demonstrate the value of their expertise.

ANALYZE

Validate portfolio recommendations. Wealth360's asset allocation solution provides an advisor with the ability to execute his or her fiduciary responsibility through capabilities such as historical back-testing, current portfolio comparison, and wealth projections. Armed with an in-depth understanding of a client, an advisor can produce an Investment Policy Statement (IPS) or proposal with the click of a button.

ADVISE

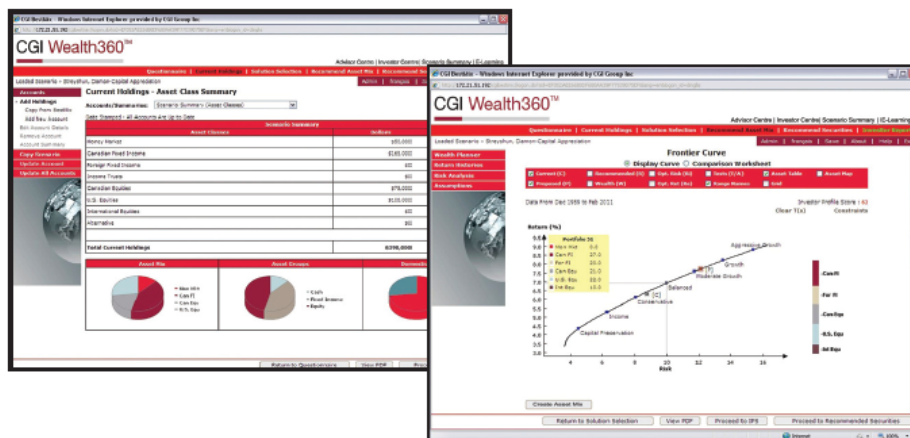
Help your clients plan for the future and along the way ensure they are on course. Through Wealth360, demonstrate asset allocations that will align a client's expected return with his or her risk profile. As financial objectives or



AN INTERACTIVE & COMPREHENSIVE TOOLSET FOR ADVISORS

- Web-based sales tools
- KYC and risk profiling
- Alternative investment scenarios
- Wealth projections
- "What-if?" scenarios
- Automated Investment Policy Statement generation
- Monte Carlo simulation
- Interactive client education
- Dynamic portfolio optimization
- Historical back-testing
- Portfolio scenario comparison
- White-labeled
- Configurable:
 - Questionnaire
 - Scoring metrics
 - Asset classes
 - Asset allocations

personal circumstances change, easily recall a client's IPS and update information accordingly. Demonstrate appropriate adjustments to the recommendations and move clients from their current holdings easily into firm-designed or custom allocations.



CGI WEALTH360

As part of a larger suite, CGI's Wealth360 asset allocation solution provides an advisor with the capability to better understand and establish a client's financial goals and the means to achieve them. Help advisors build their client's wealth and, at the same time, their own book of business with the functionality of Wealth360's asset allocation solution.

CGI Wealth360 is a comprehensive suite of solutions that help wealth management professionals anticipate change, offer creative options, and increase efficiencies as they manage their clients' investments. From front-office sales tools to middle-office decision making and back-office administration, CGI Wealth360 delivers an industry-leading, end-to-end wealth management solution.

ABOUT CGI

CGI's Global Wealth & Capital Markets practice has more than 35 years of experience in developing and operating software solutions for the financial services industry. Our systems and solutions are functionally robust and designed to increase productivity, reduce errors and improve customer satisfaction. The technologies behind these solutions are industry proven and used extensively by some of North America's largest financial institutions. CGI delivers all of these systems, services and solutions within a comprehensive quality framework defined by ISO 9001 and CSAE 3416 standards.

With 69,000 professionals in more than 40 countries, CGI is one of the largest independent information technology and business process services firms in the world.

For more information about CGI, visit www.cgi.com/wealth360 or email us at wealth360@cgi.com.