

CGI Wealth360™ Plan Administration

In the current economic environment, customers are looking for ways to efficiently manage their savings and plan holdings. This requires a solution that enables a financial institution to deliver a competitive and agile product mix, which in turn provides the ability to deliver superior customer service, capture market share, and increase customer spend.

COMPREHENSIVE

CGI's Wealth360™ plan administration solution provides a proven and robust multi-currency platform, serving the Canadian financial services industry. Powered by CORE, Wealth360 manages the legislative features for all federal and provincial rules associated with registered and non-registered plans. It provides financial institutions with the capability to design and develop a unique suite of products that can be delivered quickly and economically to any point of sale within a client's organization. Benefits include the following:

- Support for all federal and provincial products such as RRSP, RRIF, TFSA, RESP, RDSP, and non-registered plans
- Savings account component that manages all of the credits and debits that flow through the plan, enabling the plan to act as a central account for transactions, plan reporting, and taxation
- Open architecture that supports the integration of plan administration and term products into any financial institution's sales and distribution channel, assisting organizations in attracting and retaining customers, capturing market share, and increasing revenue

CUSTOMER-CENTRIC

CGI's Wealth360 plan administration solution provides financial institutions with a consolidated customer-centric view of all plan holdings. The strength of the solution lies in the separation of the plan from the investments held in the plan. This allows for the management of all legislative and taxation rules at the plan level and improved time-to-market, enabling changes to be made quickly and economically. Legislative changes are made once and delivered to all plans simultaneously without impacting the investments held.



FEATURES & BENEFITS

- Investment plan and term product administration
- Supports registered and non-registered plans
- Currently administers more than three million plan accounts and more than two million term deposits
- Complete separation of investment plans and investment products
- Supports a component-based installation that is compatible with existing infrastructures
- Industry-leading index-link functionality
- Real-time product creation and management

TERM MANUFACTURING

CGI Wealth360 provides a term deposit manufacturing solution that delivers the rich functionality and scalable platform needed to succeed in the competitive term deposit market, servicing products such as regular, step rate, index linked and equity linked terms. A reusable design allows organizations to create a product once and deploy it across all registered and non-registered plans, resulting in increased operational efficiencies, reduced costs, and the ability to go-to-market quickly.

Available Products & Support

Extensive support for all fixed-term product types	Marketing channel support and controlled customization	Real-time product management functionality
<ul style="list-style-type: none"> • Simple and compound Interest • Equity linked GICs • Index link with extensive rate of return calculation functionality • Variable rate and step-up interest rates • Multiple redemption options 	<ul style="list-style-type: none"> • Discretionary interest rate amounts available to approved representatives • Interest rate bonus amounts based on client type or value • Controlled availability or limited time offers for index link, equity linked and other product types 	<ul style="list-style-type: none"> • Real-time product formation to develop new term products • Real-time tuning of interest rate and parameter adjustments of products offered for sale

CGI WEALTH360

Wealth360's plan administration solution is robust and empowers financial institutions to successfully meet their strategic goals by achieving real-time plan administration, improving the time-to-market for new term products, and enhancing existing products.

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.