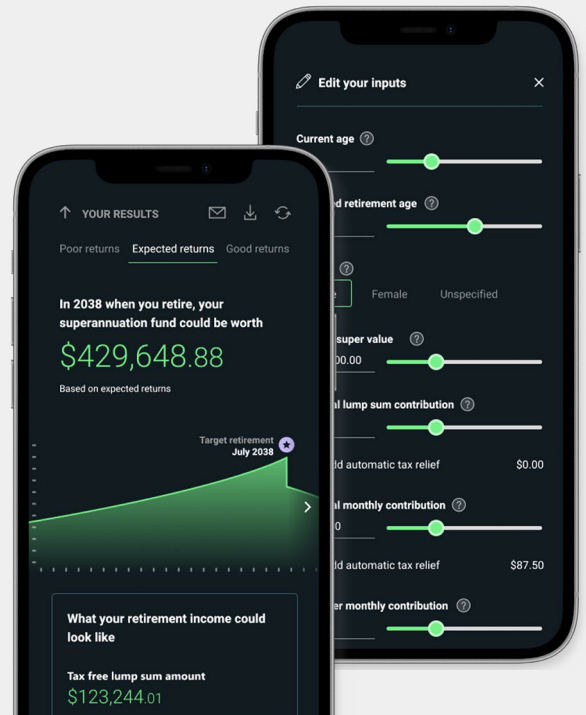


Equate

Financial calculators and tools to engage and educate your customers



Enhance your digital experiences and empower your customers to make informed financial decisions.

With over 30 embeddable calculators to choose from across the lending, wealth management, insurance and tax space, our calculators can be set up in your brand and displayed on your website in no time. Use on your website, in apps or in private portals to educate your members, onboard them to your products and support adviser led discussions with members.

Built with accessibility and responsiveness in mind, our tools are responsive across mobile devices and tablets. They are supported by all major browsers and can integrate with the majority of content management systems. All our calculators come with an accompanying API which allows you to create your own user interfaces on top of our calculation engines.

Features

Build engagement

Bring your products to life and keep customers on your website longer.

Improve leads

Educate your clients and generate qualified sales-ready enquiries.

Increase conversions

Build trust and win more customers by supporting their financial decision making.



GBST really understood our vision and the combination of their financial, technology and user experience expertise helped us get the best possible solution. Visitors that use the refinance calculator on our site are more than twice as likely to submit an application.

Nathan Walsh
Co-Founder & CEO of Athena



Tools for every touch point

Equate

With Equate, you'll benefit from:



Attracting new business

Use scenario building tools with calls to action to collect data and generate qualified leads for your products.



Signing up new members

Speed up the onboarding process by using initial stage data to pre-fill detailed tools.



Engaging current members

Use real client data to illustrate their current financial position and future projections.



Marketing to existing members

Inform members about new product offerings with widgets or infographics driven by the calculator engines or within the tool itself.

Equate at a glance

✓ Extensive range of calculators

- Wealth management – retirement modelling and investment projection
- Lending – loans, repayments and budgeting
- Insurance – life, total and permanent disability/critical illness cover, income protection

✓ Supported by experts

- Legislation updates included
- Dedicated support, within business hours
- Design consultancy available

✓ Leading technology

- Hosted in AWS
- Secure and private, no personal information stored
- Compliant with level AA of the W3C Web Content Accessibility Guidelines
- Responsive across all devices
- Built on JavaScript and in-house React-based GEL framework
- Integrates with analytics platforms

Custom solutions

Anything is possible with custom calculators. If you aren't sure what you need, our financial and user experience experts can work with you to understand your objectives and create the ideal solution.

- **Tailor it to suit you** – Take one of our tried and tested calculators then modify the UI layout, data fields and calculations to suit your needs.
- **Build on our engine** – Get creative with your own user interface and plug into our calculator engine through our established calculator APIs.
- **Create it from scratch** – Work with us to design and build an unique tool to meet your requirements.

Web service API

Looking to build your own calculator user interface? Or wanting to use the calculations within an existing system or process? Our calculator APIs may be what you are looking for.

- 31+ APIs to choose from
- Build your own interface around our calculation engines
- Test APIs available

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.

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