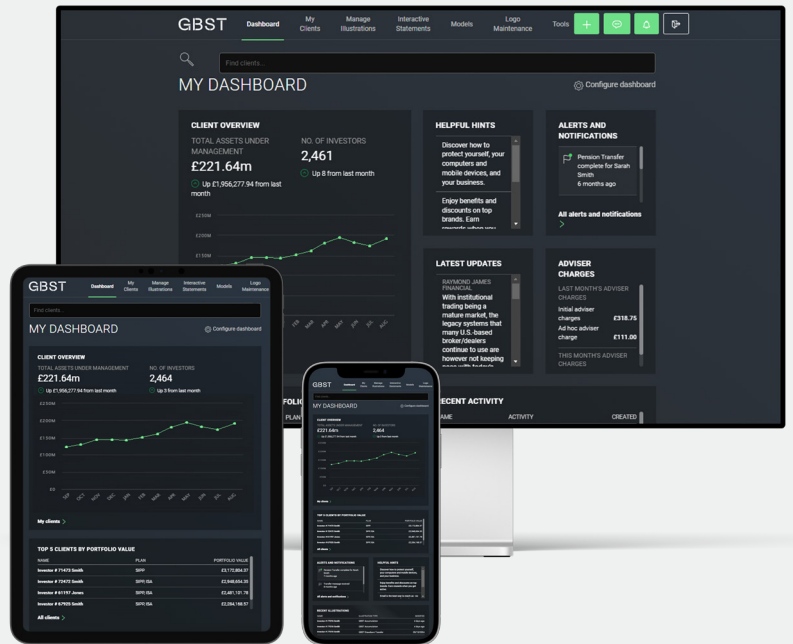


GBST

Catalyst

Delivering engaging digital customer experiences



Catalyst is a digital wealth management platform that delivers flexible and customisable online experiences for advisers, employers and investors, processed straight through to the back office platform.

In an increasingly digital world, Catalyst is the responsive, content driven solution to engage customers online. Supporting both retail and workplace solutions, Catalyst enables self-service in an unrivalled experience that today's consumers expect.

Built on a modern open architecture, Catalyst combines data, tools and content to provide a holistic wealth experience. The suite of transactional user journeys removes the manual processes in the back office and reduces operational costs.



We are delighted to have GBST as the strategic technology partner for our new proposition, VitalityInvest. GBST's innovative solutions will enable us to deliver a rich and engaging customer experience and allow advisers to seamlessly access our portfolio of investment, life and health products.

Justin Taurog

Managing Director, Sales & Distribution
VitalityInvest and VitalityLife



Benefits

- 01 Improve user performance**
Full breadth of self-servicing journeys to allow advisers and investors to onboard and transact online with straight through processing to the back office.
- 02 Boost user engagement**
Tailor the customer experience to specific propositions, with self-managed content and configuration overlaid across a core set of user tested features.
- 03 Innovate and scale offerings**
Power the latest propositions and disrupt established business models by incorporating third party components, tools and multi-platform data aggregation on a modern technology stack.

Inspiring wealth innovation

Differentiate your offering with a compelling digital experience

Catalyst



Simple self-service

Users can onboard and manage accounts online - all integrated to the back office for automated processing.



Handy updates

Alerts and notifications keep users informed and tell them when they need to take action.



Interactive tools

Built-in calculators engage users and interactive dashboards help to personalise experiences.



On-the-go access

Users can access full portal functionality from any location and any device or browser.

Catalyst at a glance

✓ Single platform for all products and users

- Retail and workplace solutions
- Advisers, DFM, employers and investor user roles
- Role based features through configuration
- Pension, ISA, JISA and GIA product wrappers

✓ Reach clients at all stages of their journey

- New business user journeys
- Account servicing user journeys
- Alerts and notifications

✓ Integrate with trading management and settlement systems

- Buy, sell and switch online
- Create, modify and assign model portfolios to investor accounts

✓ Offer an interactive, personalised experience

- Customisable dashboards and views
- Charting and interactive online statements
- GBST and third party integrated tools and calculators
- Content management integration for real-time publishing

✓ Save time in the back office

- Real-time back office updates and status
- Online document repository

✓ Scalable and flexible to support business growth

- Self-service and secure user administration
- Modern technology and open architecture
- Managed service hosting options

Self-servicing journeys

Catalyst empowers advisers, employers and investors to engage and transact online. This integrates seamlessly into the administration platform, lowering operational costs, removing re-keying and automating back office functions.

Select from a broad set of pre-integrated user journeys by persona to maximise the self-service capabilities.

User journeys available across product wrappers and perform servicing transactions such as top up, withdraw, trade, portfolio model management and account maintenance. User tested with advisers and investors to create efficient and engaging online servicing journeys.

Choose how you use it

GBST recognises that no one size fits all and differentiation in the digital space is of paramount importance.

- The Catalyst framework provides pre-integrated digital user journeys to accelerate digital transformation. GBST leverages these digital accelerators alongside third party integrations, content and tools to customise the experience to specific requirements.
- The digital solution offers a personalised approach and ensures you get to benefit from the investment already made to rapidly launch a fully self-service solutions. It also offers the option to own and run the solution on an ongoing basis or rely on GBST expertise to do this on your behalf.

About GBST

GBST is a global provider of technology and digital solutions for the wealth management and advice markets. We create vital back, middle and front-office technology solutions for wealth managers, life, pension and superannuation companies, stockbrokers, and fund managers.

Founded in 1983, GBST works with over 100 financial brands across Europe, Australia, New Zealand, the United States, Canada and the Middle East. Our 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.

info@gbst.com | +44 20 7613 8800



www.gbst.com