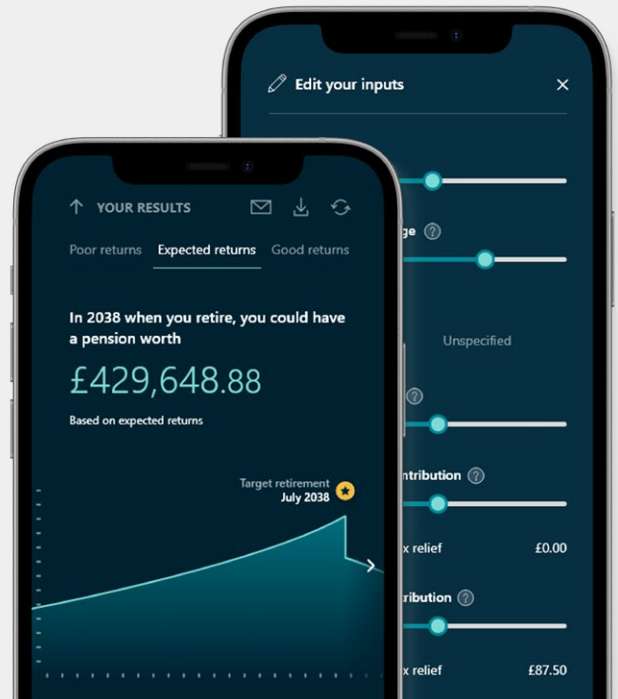


Equate

Powerful financial calculators for digital engagement



Enhance your digital experience and help your members make informed financial decisions with powerful calculation engines and interactive tools.

Our suite of calculation engines, scenario modellers and 'what if' tools help you stand out in a complex and crowded market where clients demand great digital experiences. Use on your website, in apps or in private portals to educate your clients, onboard them to your products and embed your brand in their financial journey. As well as self-serve, our tools can also support adviser led discussions with their clients.

Equate tools are built using current device responsive technology and updated to ensure regulatory compliance. Turnkey options cover the full spectrum of financial services from simple loans to advanced retirement modelling and are easily integrated into your website. Our complex calculation engines can also be customised and used to power your own user interface (UI) or built into your own unique tool.

Features

01 Convert prospects to members

Bring your products to life and drive clients from researching to taking action, generating sales-ready leads and building trust to increase conversions.

02 Engage and retain members

Boost client satisfaction and loyalty by providing tools that use their actual data to help them plan for their future and get the most from your products.

03 Boost operational efficiency

Reduce cost to serve by empowering clients with self-serve tools to explore their options and automating processes through to your back office systems.



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 by **GBST**

With Equate, you'll benefit from:



Attracting new business

Showcase your products using scenario building tools with 'calls to action' that collect data to generate quality leads.



Signing up new members

Accelerate the onboarding process by building on data already collected in the initial stage to pre-populate detailed tools.



Engaging current members

Use real client data to show their current financial position and where they are likely to be in future based on projections.



Marketing to existing members

Promote new offerings and drive behavioural change with upsell widgets or infographics powered by calculator engines.

Equate at a glance

✓ Extensive range of calculators

- Wealth – retirement modelling and investment projection
- Personal finance – loans, repayments and budgeting
- Personal insurance – life, total and permanent disability/critical illness cover, income protection

✓ Supported by experts

- Developed by financial technology specialists
- Ongoing support included
- Digital strategy support
- Legislation and compliance updates included

✓ Leading technology

- Built with HTML5, CSS3 and React
- Desktop, phone and tablet responsive
- Compliant with Level AA of the W3C Web Content Accessibility Guidelines
- Amazon Web Services based APIs
- Ready for analytics
- Cloud hosted

Quick start solutions

Our turnkey tools include the calculation engine and an intuitive UI designed by our user experience experts.

There are plenty of ways to add your own brand touches to these calculators:

- **Configure** – our standard UI can easily be configured to match your brand colours, tone of voice and default data inputs.
- **Customise** – take one of our tried and tested calculators then modify the UI layout, data fields and calculations to suit your needs.
- **Create** – work with us to design and build a 'from-scratch' unique tool to meet your exact requirements.

Once built and tested, your calculator is delivered as a snippet of code. Simply copy and paste into your website and it's live - no programming required.

Harness the power of the engine

We can also provide our calculation engine code for you to tap into. This is ideal if you prefer to build your own UI or link it with an existing tool.

This approach also allows you to expand beyond the common use cases and create apps, decision engines and infographics using our validated and robust calculation capabilities behind the scenes.

About GBST

GBST is a global provider of technology and digital solutions for the wealth management market. 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, and Canada. 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.

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