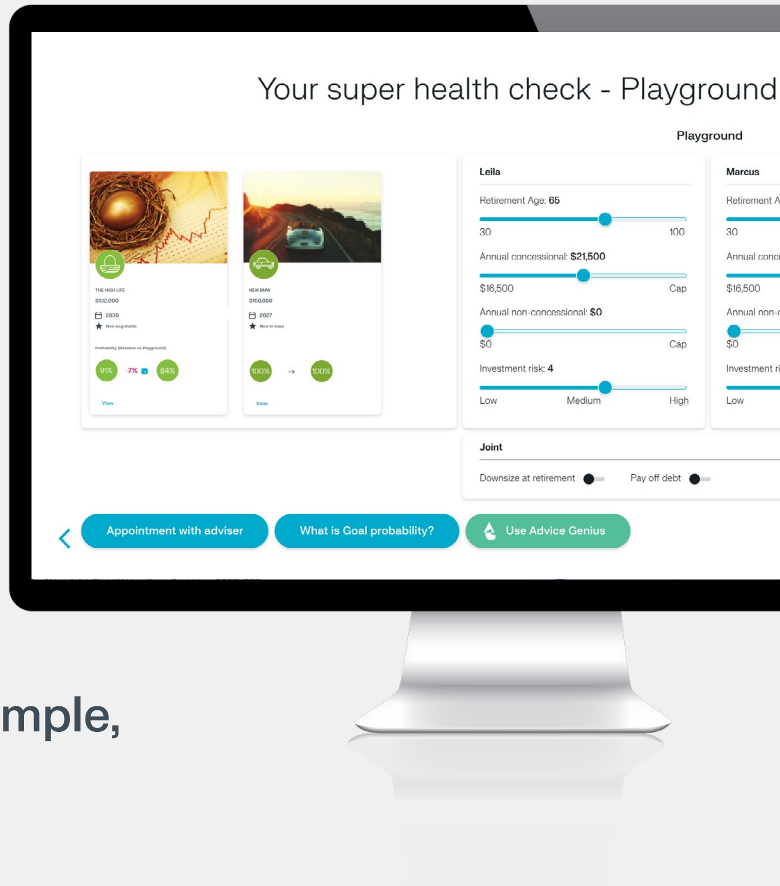
GBST

Advice Intelligence

Digital advice solutions made simple, for super funds and members.



Effective, engaging advice has never been easier for superannuation funds to deliver to members. GBST's Advice Intelligence solution creates unique and configurable digital advice journeys for your members. It leverages robust goals and strategy modelling to shape an easy advice process designed around the individual financial needs and life goals of members.

QAR and the Retirement Income Covenant give super funds an opportunity to improve member retention and increase new member acquisition.

By seamlessly integrating efficient and secure digital delivery methods, super funds can offer their members access to quality superannuation and retirement advice at very low cost. By empowering members with a dynamic and engaging digital client experience, super funds can reinforce their value proposition by delivering goals-based advice that resonates with each member's personal values and aspirations.

Features

01 One solution, one platform

Increase value for super fund members with a simple advice solution, managed in one platform. Easily power your digital advice online and turn any digital advice journey into a hybrid one with the option of adding support from a financial adviser.

02 Industry leading strategy modelling

Whether accumulating wealth or approaching decumulation in retirement, Advice Intelligence's Milliman-powered engine offers a digital journey for advice strategy optimisation. With robust economic assumptions, stress tests, advice strategies, superannuation and tax law, we reduce the 'assumption gaps' of other digital advice providers, for more complex problem solving.

03 The power of choice for members

Our goals-based advice solution offers super funds a tool to enhance member engagement and retention through a self-directed digital advice experience, empowering members to take control of their financial lives. For members that have more complex financial needs, our software can adapt to deliver personal advice via hybrid adviser experience.

We help super funds to be at the forefront of digital advice and wealth management.

Advice Intelligence Digital

a.i. Digital combines a proven and innovative professional adviser platform with powerful digital functionality, to provide personalised advice and educational experiences for super fund members, and simple hybrid advice for adviser teams.

With live client-facing modelling, intuitive strategy optimisation, and seamless reporting capability, our single, streamlined platform helps super funds shape their service offering and enhance their value.

Advice Intelligence Professional

a.i. Professional offers a seamless, device-agnostic user interface for super fund advice teams.

Our hybrid advice platform enables financial advisers to explore member goals, model advice strategies, and compare future scenarios with clients in real-time, producing an instant SoA/RoA.

Our solution extends to personal advice, automating costly manual tasks to maximise adviser efficiency, delight clients and decrease the cost of delivering advice.

Market-leading strategy optimiser

Our optimisation engine enables super funds to choose the strategies they want in scope, with the ability to optimise across intra-fund and personal advice. a.i.'s unique optimiser can self-determine the most appropriate strategies for optimal outcomes in line with member goals and life aspirations.

Build better futures for members

Maximise member retirement income, manage longevity risk, and dispel uncertainty with digital advice. Shape a personalised and engaging advice journey that ensures assets and income meet member's changing goals, helping to guide them through each life stage.

Keep members engaged and educated

With our interactive member engagement portal and digital advice journey, enhancing engagement and improving retention is simple. Utilise digital touchpoints and education tools embedded in each stage of the advice process, and provide easy access to exclusive articles, videos, and advice tools, tips and tricks.

Low-cost advice model

Increase business efficiencies and effectively produce advice at scale. Lower the cost to serve advice and increase reach to orphaned members.

Simple reporting and auditing

A dynamic digital advice journey enables each component of the value chain to be tracked. From data entry and SoA execution, to measuring retention of members and assets, call on any data point with ease.

Digital to hybrid – offboard with ease

As our platform uses the same centralised engine calculations and compliance framework for both digital and hybrid advice, progressing through the stages of the advice journey is easy. Use chat, phone, or virtual adviser support at any stage in the digital advice journey to auto-create advice cases for your adviser team.

About GBST

GBST delivers technology and digital solutions to enable, support and scale wealth management 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.

info@gbst.com | +61 2 9253 6555

www.gbst.com

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