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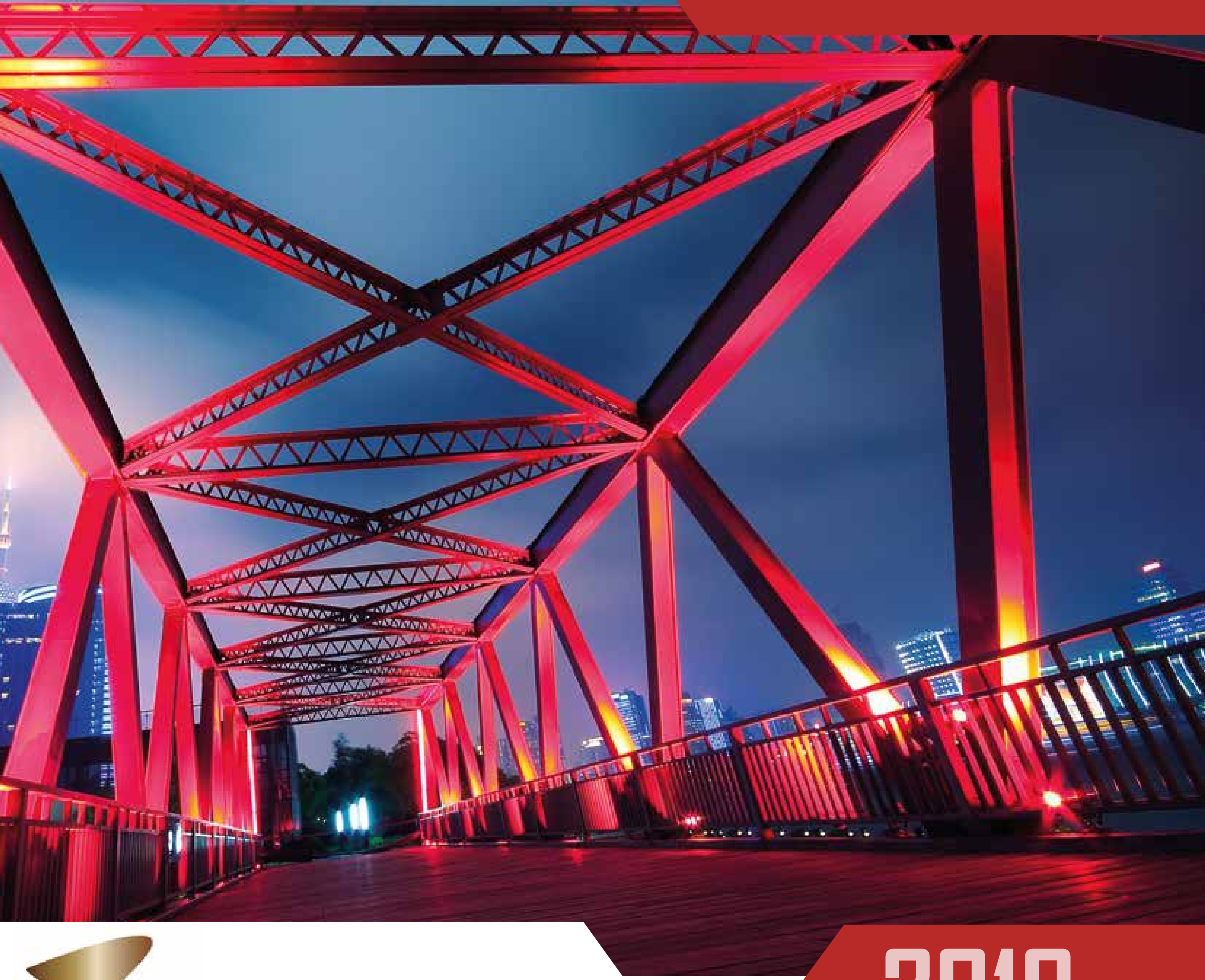
Delivering tomorrow's solutions today

Channel Plus
The clever agency solution



2018

Irish Pensions AWARDS 2017
WINNER
PENSIONS TECHNOLOGY PROVIDER OF THE YEAR

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FINANCIAL INNOVATION AWARDS
Finalist 2017
Presented by The London Institute of Banking & Finance
UK FINANCE

FStech awards 2018 SHORTLISTED

Insurance CIO Outlook
TOP 10 Policy Administration Solution Providers - 2016

PENSIONSAge AWARDS 2018 SHORTLISTED

FINTECH INNOVATION AWARDS 2016 FINALIST

A cloud-based automated solution that supports distribution and compensation management for the life, pensions, and wealth sectors across all distribution channels.

Channel Plus is a configurable solution that focuses on improving efficiency, reducing costs, and overall increasing profits.

By maximising automation and minimising manual interaction, Channel Plus provides the business functionality needed for effective distributor management, fee/commission calculations and payments across multiple distribution channels, supporting regulatory compliance and distribution monitoring.

Channel Plus is fully RDR (Retail Distribution Review) compliant. Its calculation and payment functionality has been extended to cover fee payments as well as commission payments, to provide a single solution to support the sale of RDR regulated products such as investments and pensions as well as non-RDR products such as protection.

The implementation of Channel Plus enables companies to unify all their distributors' administration services onto a single platform, yielding operational efficiencies and providing an improved service to all their customers.

Channel Plus is a highly configurable platform that can quickly modify to execute and adapt to your distribution and sales strategies. Supports multiple compensation plans such as flat commissions, transactional and percentage commission structures,

Channel Plus provides both business and technological users control over their operations, enabling them to more effectively service their agents, brokers, independent financial advisors and direct salesforce. By automating key processes, tasks, calculations and charges these proven solutions reduce the administrative overhead and risk associated with increasingly complex distribution, fees and commission management.

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Key features of Channel Plus

Efficient management of complex hierachies

- configurable n-tier hierachical structures
- flexibility to implement new structure as required with differing appointment processes
- graphical views of hierachies

Fee & commission management capability

full charge calculation - Fee structure & complex commission calculations with charge event processing - Ongoing adviser services & policy commission events. Automated reporting & flexible payment supported

Improved service levels

to distributors, advisors, sales force & internally - online self-servicing options, e.g. account balance, statements & payment

SaaS / cloud-based

24/7 interactive system

Reduced costs & process efficiencies

streamlining of business processes, removal of manual intervention/workarounds. Supports regulator uploads

Reduced risk exposure / fraud

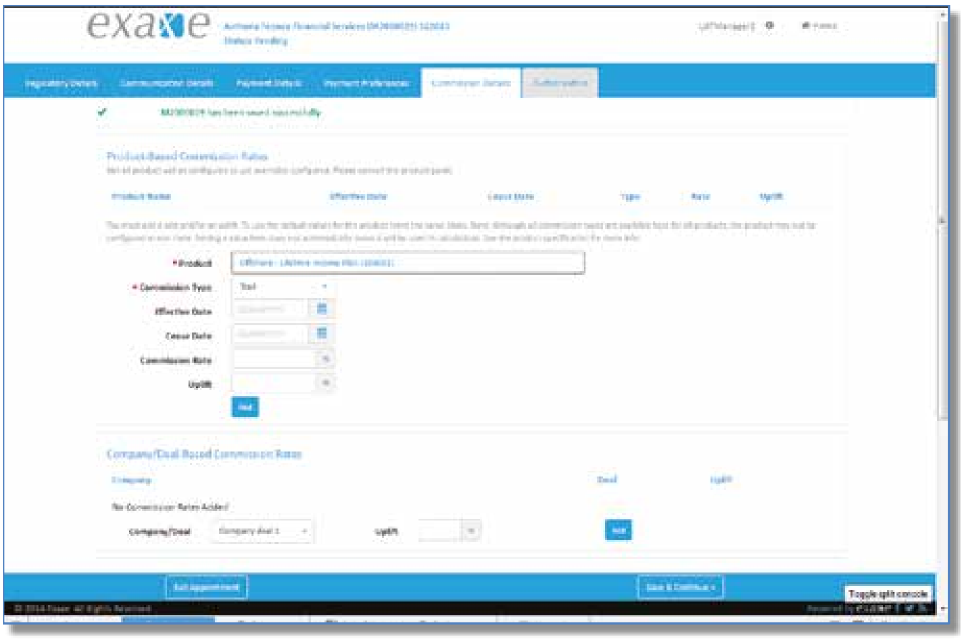
comprehensive control of commission & fee structures, calculation & payment with automated debt & exposure management capability. A single store of all data agent, fee & commission & all relationships

Ease of integration

fully web serviced, all functions offered externally

Multi-currency, multi-language environment

All database driven



High-level Functionality

Fee / commission management

- Calculation
- Commission & fee accounting
- Contract definition - commission / fees
- Self service & online payment requests
- Unified view of loans & debt mgt.
- Commission & fee statements
- Payments & payroll integration
- Commission account enquiries

Hierarchy management

- Transfer
- Suppression
- Servicing & enquiries
- Qualifications & ongoing professional development
- Regulatory compliance & monitoring
- DSF / broker / network appointment
- Internal audit & control
- Hierachy management
- MI & reporting
- Cancellation