

## Altus Transfer Gateway (ATG)

### Version 3.2.30

#### Feature note

The latest version of our Altus Transfer Gateway (ATG) is available to clients.

ATG offers platforms, pension administrators, wealth managers, custodians and fund managers the industry's most comprehensive solution for automated account transfers and asset re-registration, and supports the widest range of transfer types and asset classes.

ATG is the only automation software in the UK to support the entire share class conversions process.

#### SUMMARY OF NEW FEATURES

The latest version of ATG enables the automation of the conversion process from the ceding platform through to the fund managers. It will also include the list of conversions supported by the ceding provider for each asset included in the transfer. By automating the entire process, financial services providers will be able to ensure quicker and smoother transfers for the end-investor.

This release also includes a whole range of new features and enhancements to ATG's Access Management Server, asset re-registration and transfer facilities, and major security enhancements.

#### Share Class Conversions

This latest version of ATG brings a host of improvements and new features to its existing conversion feature:

- ▲ Automatic inclusion of common and alternate share class information when responding to an information request
- ▲ Available conversion data provided for all transfer in assets, including those offered by the ceding party
- ▲ Automated and manual support for pre-transfer conversions
- ▲ Automated and manual support for post-transfer conversion to preferred share classes
- ▲ Enhancements to API and CSV interfaces to include available conversions and defaulting information
- ▲ Intermediate Unit Holder support for standalone conversions
- ▲ Ability to process manually instructed Intermediate Unit Holder conversions electronically
- ▲ Document generation support for all aspects of conversion requests



## Improved security features

The new version of ATG comes with added support for Single Sign On. Using AzureAD, Single Sign On allows ATG users to use one set of login credentials to access multiple applications. SSO eases the management of various usernames and passwords and offers enhanced system security, including multi-factor authentication.

## Access Management Server

ATG's Access Management has been redesigned and enhanced:

- ▲ New structure for more effective data management
- ▲ Tree data changed to filterable and sortable grids for ease of use

## Asset Re-registration and Transfers enhancements

- ▲ Additional checks for asset type support on received transfer requests
- ▲ Ability to include instructed holdings when adding manual transfer out cases
- ▲ Improved asset re-registration process, including a check to auto-reject re-registration requests for non administered funds
- ▲ Ability to reject asset re-registrations when maximum allowed decimal places are exceeded
- ▲ Improved pension drawdown support
- ▲ Improvements to BACS Cash ISA service integration

ATG v 3.2.30 went live to clients on 28<sup>th</sup> November 2020.

For more details about ATG's new features, or for a copy of the full release note, please contact us at [enquiries@altus.co.uk](mailto:enquiries@altus.co.uk).