GBST

Driving Efficiency Through Digital Technology

Altus

Platform Efficiencies: "Giving your platform wings"

19th September 2018

Vitality INVEST

Find client...

+ Quick Quote

- Dashboard
- My Clients
- Quotes and Applications
- My Models
- Tools
- Management Info

Betty Adviser
IFA

Alerts and Notifications
Literature and FAQs
Settings

MY DASH

⚙ Configure Dash

59%

IN VITALITY FUNDS

£23,352,111.79

All clients with Vitality funds ›

ALERTS AND NOTIFICATIONS

⚑ Stalled new business for Ariel Pink

• Boris Bearing contributed money into his account

• Emily Smith withdrew money from her JISA

All alerts and notifications ›

RECENT QUOTES

NAME	PRODUCT	
B. Bearing	SIPP	30min
G. Berger	SIPP	1h
S. McCallum	ISA	4h
D. Fraser	Drawdown	1d
J. Storm	JISA	1d
E. Barr	SIPP	1d
E. Giles	ISA	1d
K. Dawson	ISA	2d
O. Mengel	Drawdown	2d
A. Stoddart	SIPP	4d
B. Schultz	ISA	1w
C. Morgan	ISA	2w

All Quotes ›

CLIENT OVERVIEW

TOTAL FUM

£39,579,850.04

🟢 Up £1,402 from last month

NO. OF CLIENTS

25

🔴 Down 1 from last month

£40M
£30M
£20M
£10M
£0

JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR APR MAY

ADVISER CHARGES

CHARGES PAID LAST MONTH

Initial	£1,000.00
Ad-Hoc	£100.00
Ongoing	£4,000.00

CLIENTS BY PORTFOLIO VALUE

NAME	PRODUCT(S)	FUM	% VITALITY FUNDS
Mr Boris Bearing	SIPP	£5,221,000.00	
Dr Grant Berger	SIPP	£5,046,000.00	
Sir Shaun McCallum	ISA, SIPP, JISA	£4,489,000.00	

SAVED SEARCHES

NAME

Filtered List 04

Health Members

Favourite Clients

25+

SELF SERVICING JOURNEYS

QUOTE & APPLY
TOP UP
TRADING
MANAGE MODELS
MANAGE PENSION INCOME
REGULAR CONTRIBUTION
CRYSTALISE PENSION
WITHDRAWAL
PERSONAL DETAILS
UPDATE BANK ACCOUNT

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130+

API'S CALLED

CUSTOMER
ACCOUNT
CONTRIBUTIONS
WITHDRAWALS
INCOME
BUY / SELL / SWITCH
NOTIFICATIONS
ILLUSTRATIONS
DRAWDOWN
DOCUMENT

......

12+

3rd PARTY INTEGRATIONS

BACK OFFICE LEGACY
CRM
DOCUMENT REPOSITORY
CONTENT MANAGEMENT
TOOLS
WORKFLOW
AML
BANK VERIFICATION
POSTCODE LOOKUP
AUTHENTICATION

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STP is complex, time consuming and costly
Technology is available to support it - Efficiencies need to be realised

GBST

How analysis of data is generating value
Vitality Case Study
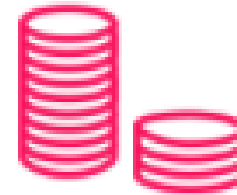
LIFE

HEALTH

INVEST

Vitality

Healthy Living Discount

"Promoting Positive Engagement in Health & Lifestyle"

Investment Booster

"Promoting Vitality Funds & Loyalty"

Retirement Booster

"Promoting the Management of Drawdown income"

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