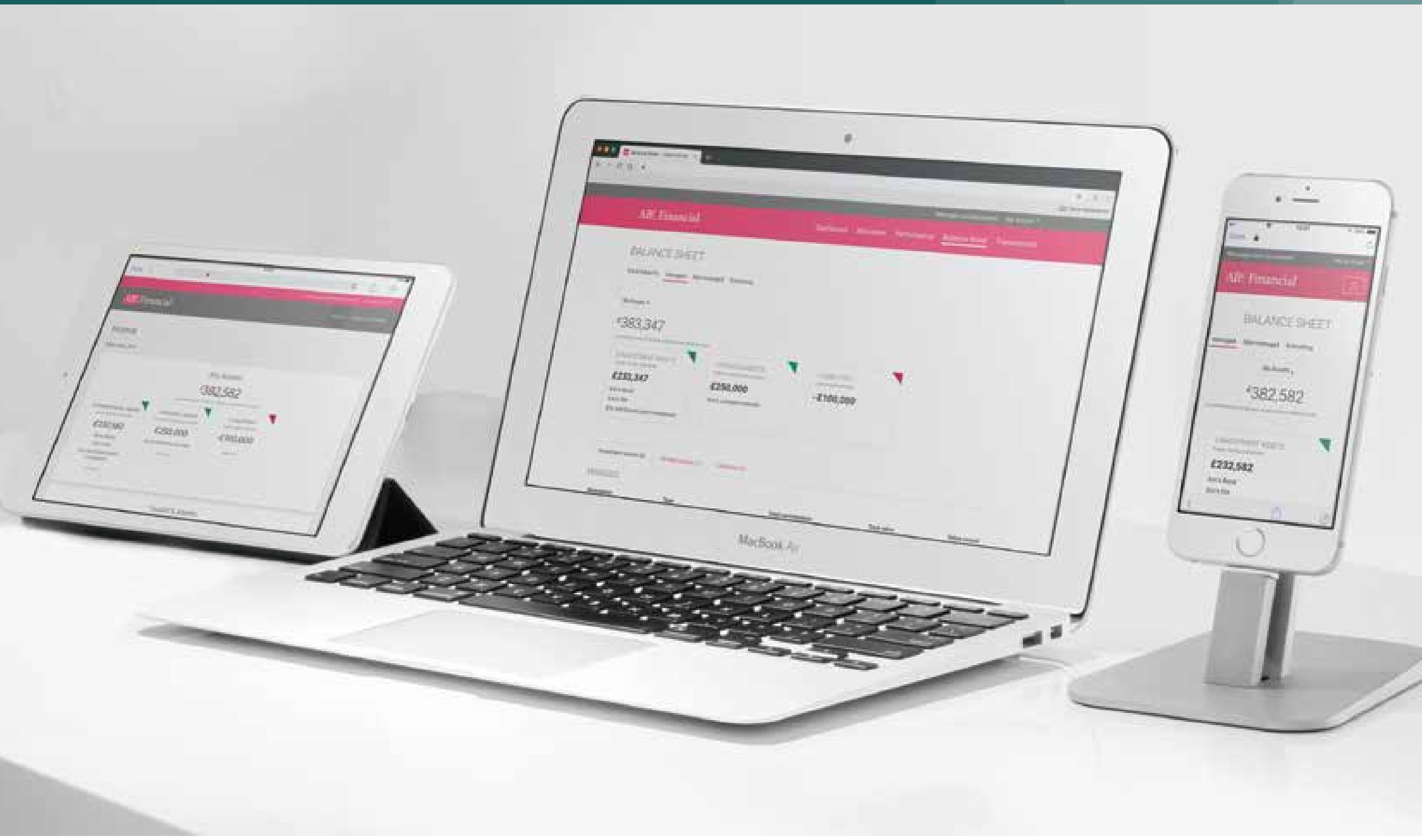
CLIENT PORTAL

PERSONALISED PERSPECTIVES. DELIVERED DIGITALLY. 24/7.



With increasing competition and digital savvy consumers comes a demand for a secure and straight-forward way for clients and advisers to engage and communicate with each other 24/7.

To remain relevant, the financial services business of today needs to deliver a professional and personalised digital experience to their clients, offering an accurate perspective of their investments and financial life. Client Portal provides a secure line of two-way communication–making it easy and efficient for you and your clients–and can be delivered at scale with ease.

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Tell me what it actually does

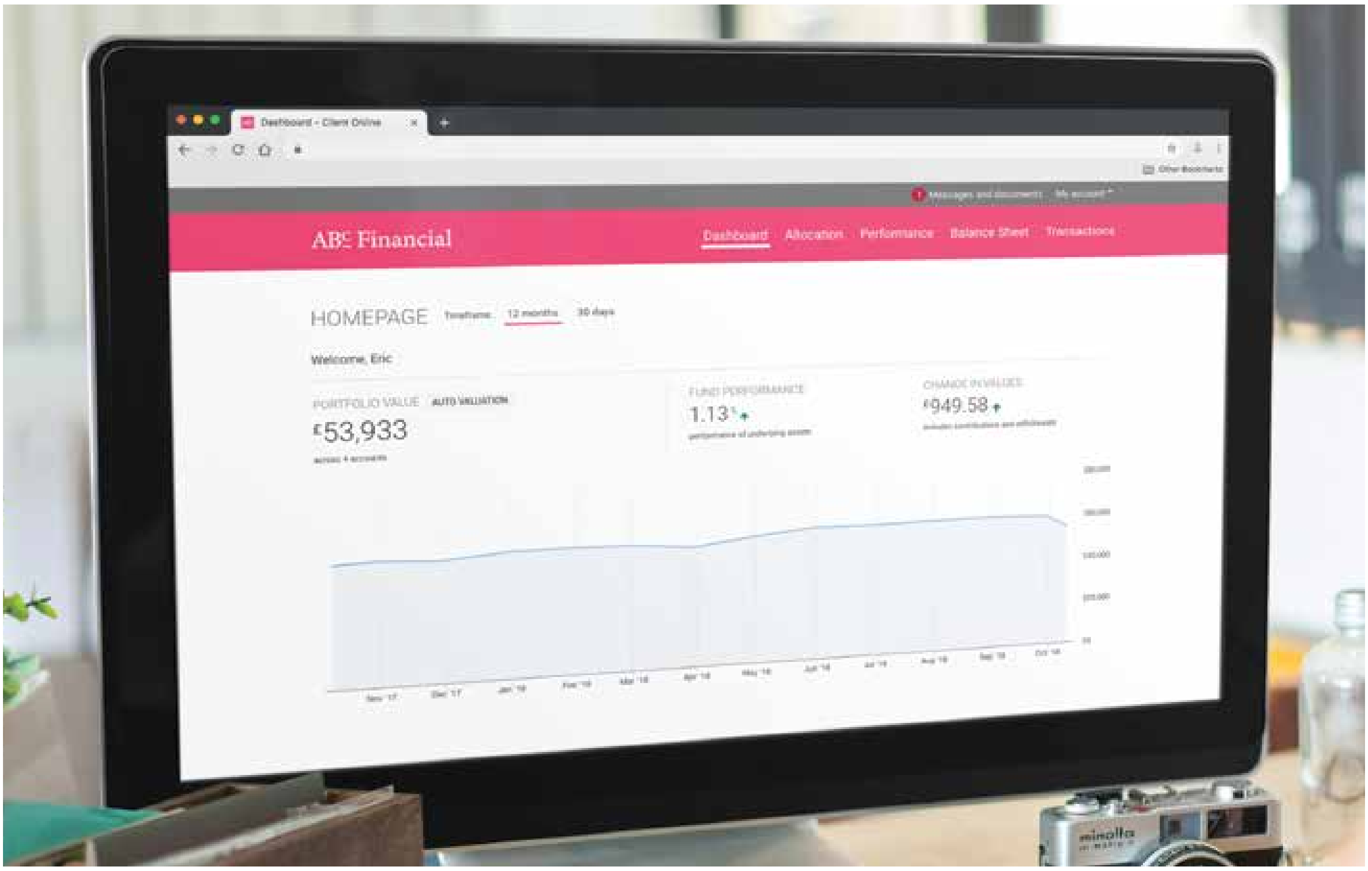
Accessible via mobile, tablet, laptop and desktop, Client Portal is contemporary and easy to navigate–your clients can engage with their financial information and interact directly with your business through secure messaging.

You select from a suite of widgets that provide information and functionality for your clients in the front-end interfaces. With different layouts to choose from, and adaptive to your brand style, it truly becomes your front-end.

The back-end is built on a sophisticated, user friendly, enterprise grade content management system (CMS) that draws on data in your existing IRESS systems and presents it in the front-end interface for your clients. The CMS is an easy to administer, flexible solution that delivers your digital client experience at scale.

In addition to a fully-configurable option, three out of the box packages are available with pre-determined widgets across the modules to make set-up even quicker. Our team can take you through these in more detail.

Show me what it looks like



Can you break it down for me?

The flexibility of Client Portal allows you to choose the set-up to best suit your business and clients needs.

Front-end client interface

The front-end client interface presents information in a contemporary, visual format that's simple to use across mobile, tablet, desktop and laptop. Developed in collaboration with clients–using our IRESS Labs co-design approach–the information and functionality that clients want is presented how clients want it.

Suite of widgets

A suite of widgets, from five distinct modules, can be configured in your Client Portal. Many widgets are available now and more are in development. The five modules are:

1. **Account Information** - giving your clients a complete perspective of their financial life.

2. **Advice** - professional services focussed on improving the onboarding and servicing experience for wealth management and mortgage clients.

3. **Transactions** - allowing your client to perform certain transactions themselves.

4. **Content** - catalogue of financial and life stage articles, videos and education programs.

5. **Communication** - all you need to make two-way communication with clients seamless.

Two-way communication

Client Portal's secure messaging features allow two-way communication with your clients, including all notifications, messages, document sharing and digital signatures.

Back-end infrastructure

The back-end infrastructure, built on an enterprise grade content management system, allows you to build and administer your Client Portal with ease, minimal training and in as little as a few hours. You choose how the portal looks by selecting appropriate themes, layout and branding. In addition, you select the widgets that you want based on the information and functionality you want available to your clients.

Data storage

The CMS draws data stored in your existing IRESS systems and presents it to your clients in the Client Portal interface. Data created or changed by the client in the portal is fed back and stored against their file in your IRESS system. The data is always housed and available via the secure IRESS systems.

Analytics

Real-time usage stats and rich data analytics measures your client engagement and provides insights for possible action or changes, with data driven campaigns and nudge tools (push notifications) functionality to power your marketing.

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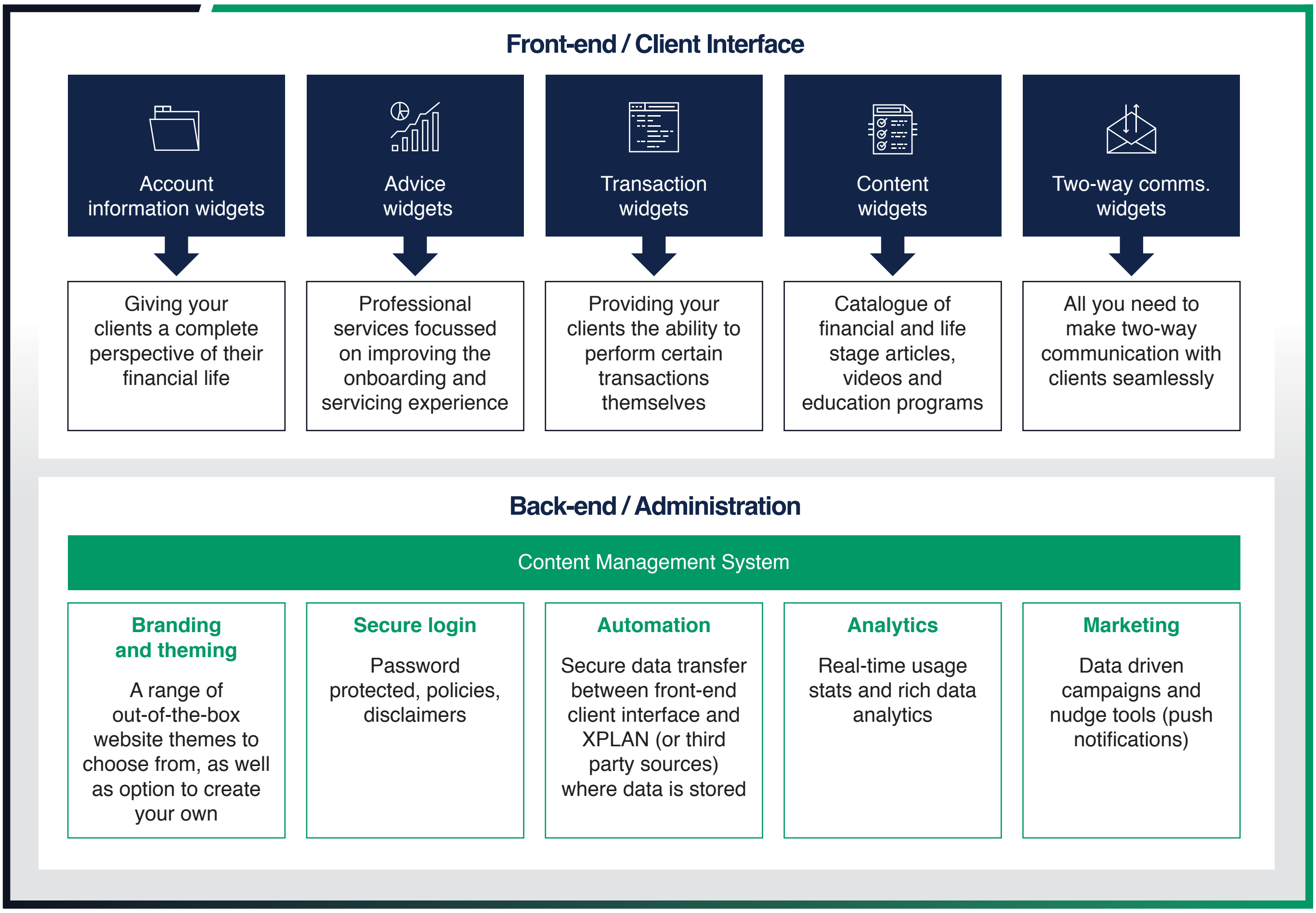
Can you draw a picture for me?



Tell me what others think about it

> “Any digital engagement tool we adopt must be aligned to our own brand values, communicate insightful information and enrich the client experience. It must provide meaningful functionality and it must be intuitive to use. The new Client Portal from IRESS delivers on this in spades.”
>
> **Cockburn Lucas Independent Financial Consulting**

Give me five reasons why I should use it

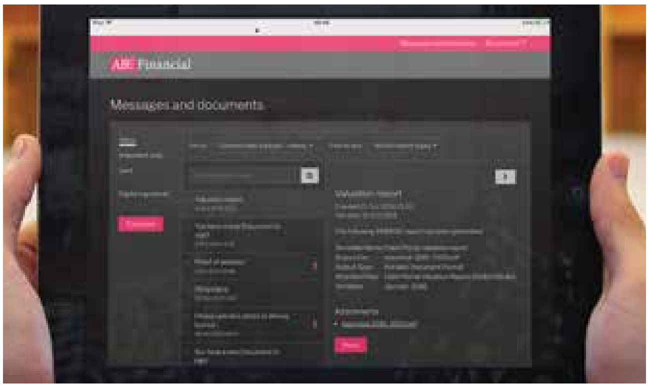
Flexible - configured to your requirements and brand and with customisable content from an array of widgets for an interactive experience.

Secure - all data and documents stored in your existing secure IRESS systems

Smart - automated processes, comprehensive usage analytics and context aware content allow you to easily adjust and respond to client needs.

Simple - easy for you to administer and user friendly for both you and your clients.

Integrated - integrates with IRESS systems, third-party data sources and software applications.



The front-end client interface presents information in a contemporary, visual format.

Simple to use and mobile friendly.

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What widgets can clients access in the front-end interface?

Advice module

Professional services focussed on improving the onboarding and servicing experience for wealth management and mortgage clients:

- Goal setting and tracking
- Attitude to risk questionnaire / profile
- Wealth management fact-find
- Wealth tools and calculators
- Cash-flow modelling
- Mortgage fact-find
- Mortgage calculators

Content module

Relevant and up to date content from IRESS Knowledge Centre online resource catalogue of financial and life-stage:

- Articles
- Videos
- Education programs
- Self-service administration

Communication module

All you need to make your communication seamless, including:

- Contact adviser
- Push notifications
- Secure messaging
- Digital signatures
- Online / video meetings
- Contact preferences

Transactions module

Providing your clients the ability to perform certain transactions themselves:

- Account opening and onboarding
- Funding and withdrawals.

Account information module

Giving your clients a complete perspective of their financial life:

- Personal details
- Documents
- Portfolio investments
- Portfolio valuation
- Portfolio allocation
- Portfolio performance
- Transaction history
- Valuation reports
- Third-party data (e.g. open banking data)
- Total wealth / net position
- Asset / liability summary
- Insurances / protection

This is a full list of widget functionality, many of which are available already and some of which are in development for imminent releases. Our team can give you the most up to date information.

The information and functionality clients want, presented how clients want it

Secure login for your clients security

What about service and support?

At IRESS, we understand software solutions go hand-in-hand with service and support. This is what we pride ourselves on thorough implementation, an expert-led support desk plus relevant user training with accompanying online resources. Learn more about our service and support offering at iress.com

Tell me how IRESS stacks up as a partner

We know our clients don't only want software that works, they also want a technology partner that works with them and that they can trust and rely on to design, develop and deliver creative and reliable software solutions. Check out our credentials at iress.com

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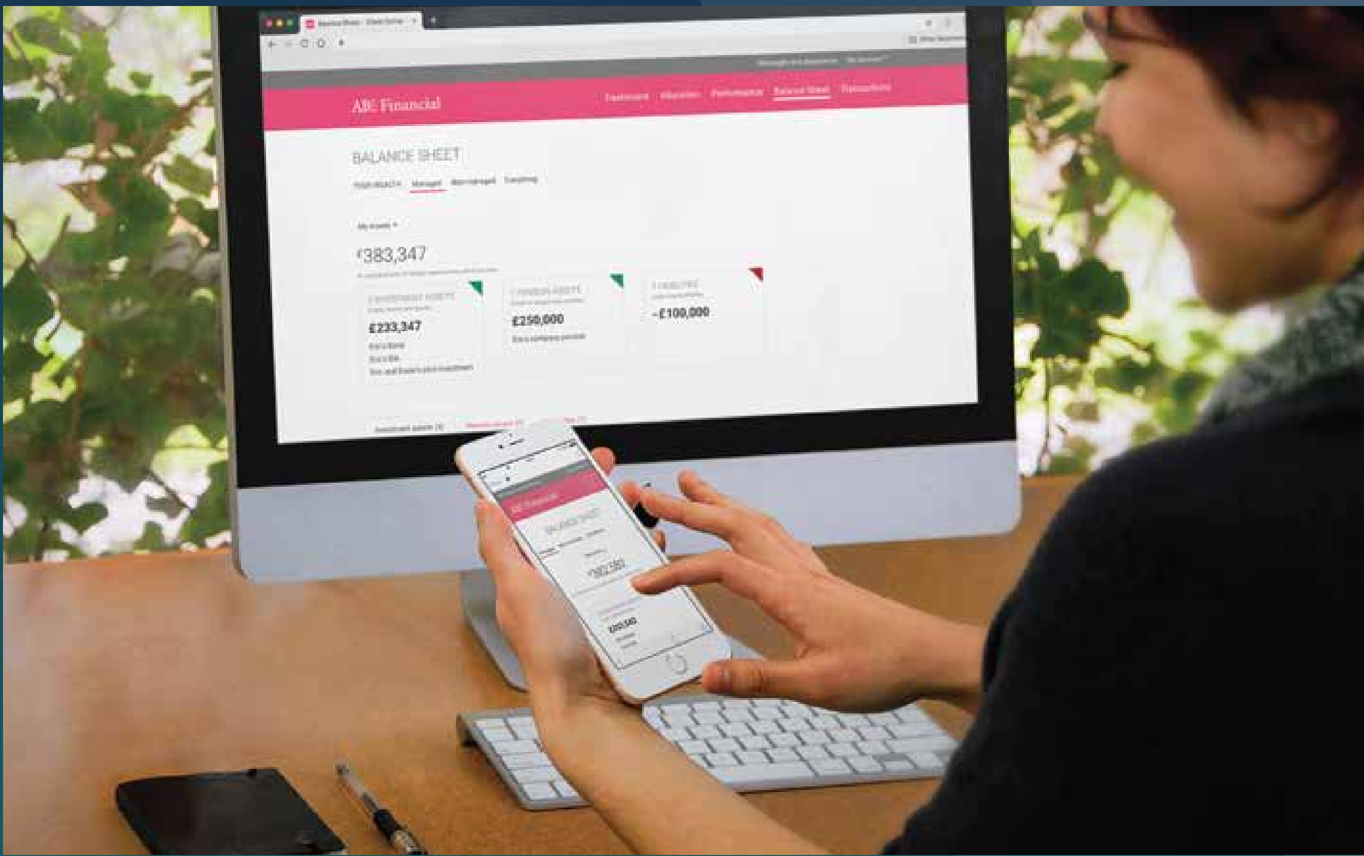

HOW DO I CONTACT YOU?

Contact us today to see Client Portal in action and how it can work for your business.

iress.com

Delivering outcomes today, developing for tomorrow, designing for the future.

Australia - Asia - Canada - New Zealand - South Africa - United Kingdom