

## Delivering engaging digital customer experiences

Digital wealth management platform to deliver flexible and customisable online experiences for advisors, employers and investors, processed straight through to the back office platform.

In an increasingly digital world, Catalyst is the responsive, content driven solution to engage your online customers. Supporting both retail and workplace solutions, Catalyst enables self-service in an unrivalled experience that today's consumers expect.

Built on a modern open architecture, Catalyst combines data, tools and content to provide a holistic wealth experience. The suite of transactional user journeys removes the impact on the back office and reduces operational costs.

*“ We are delighted to have GBST as the strategic technology partner for our new proposition, VitalityInvest. GBST's innovative solutions will enable us to deliver a rich and engaging customer experience and allow advisers to seamlessly access our portfolio of investment, life and health products. ”*

Justin Taurog  
Managing Director, Sales & Distribution  
VitalityInvest and VitalityLife



### Lower costs through automation

Full breadth of self-servicing journeys to allow advisors and investors to onboard and transact online with straight through processing to the back office.

### Boost user engagement

Tailor the customer experience to your proposition, with self-managed content and configuration overlaid across a core set of user tested features.

### Innovate and scale your offering

Power the latest propositions and disrupt established business models by incorporating third party components, tools and multi platform data aggregation on a modern technology stack.

# Putting your users first

Differentiate your offering with a compelling digital experience



## Simple self-service

Users can onboard and manage their account online - all integrated to the back office for automated processing



## Handy updates

Alerts and notifications keep users informed and tell them when they need to take action



## Interactive tools

Built-in calculators engage users and dashboards help them personalise their experience



## On the go access

Users can access full portal functionality from wherever they are, on any device or browser

## Catalyst at a glance

### ✓ Single platform for all your products and users

- Retail and workplace solutions
- Advisers, DFM, employers and investor user roles
- Role based features through configuration
- Pension, ISA, JISA and GIA product wrappers

### ✓ Reach clients at all stages of their journey

- New business user journeys
- Account servicing user journeys
- Alerts and notifications

### ✓ Online trading capability

- Buy, sell and switch online
- Create, modify and assign model portfolios to your investors

### ✓ Offer an interactive, personalised experience

- Customisable dashboards and views
- Charting and interactive online statements
- GBST and third party integrated tools and calculators
- Content management integration for real time publishing

### ✓ Save time in back office

- Real time back office updates and status
- Online document repository

### ✓ Scalable and flexible to support your growth

- User administration
- Modern technology and open architecture
- Managed service hosting options

## Self-servicing journeys

Catalyst empowers your advisors, employers and investors to engage and transact online. This integrates seamlessly into the administration platform, lowering operational costs, removing re-keying and automating the back office. Select from a broad set of pre-integrated user journeys by persona to maximise the self-service capabilities. Provide onboarding journeys across product wrappers and perform servicing transactions such as top up, withdraw, trade, portfolio model management and maintaining account details. User tested with advisors and investors to create efficient and engaging online servicing journeys.

## Choose how you use it

Catalyst can be consumed in different ways depending on your needs:

- Out of the box offering delivers a quick to market solution, enabling a fully functional digital portal to be launched in a matter of months
- Customise the user journeys and the end user experience, working with our digital consultancy team to design a compelling custom experience aligned to your proposition
- Deploy the Catalyst framework then build and maintain your own bespoke version for complete autonomy over your roadmap

## About GBST

GBST provides financial services technology to the capital market and wealth management sectors globally. We create vital back, middle and front office technology solutions for wealth managers, life and pension companies, investment bankers, stockbrokers and fund managers to help them streamline operations and engage their customers.

Established in 1984, we have a long heritage in the financial services sector. Today we work with over 100 organisations across Australia, Asia, the UK and the US and our technology supports millions of people around the world who are investing in their future.

## Interested?

Contact us for a demonstration or to get a quote for your requirements.

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