
taWeb

Direct to consumer (D2C) digital
transfer agency solution

**Financial software
solutions that deliver.**





THE TAWEB SOLUTION UTILISES AND UPDATES 'REAL TIME' OPERATIONAL DATA. IT COMPRISES TWO DISTINCT PORTALS - INVESTOR AND INTERMEDIARY, EACH OFFERING A USER EXPERIENCE TAILORED SPECIFICALLY FOR THE INTENDED TARGET AUDIENCE.

THE INVESTOR PORTAL IS INTUITIVE TO USE AND OFFERS CONVENIENT, TIME-SAVING ACCESS TO ACCOUNT DATA, FUND TRADING AND KEY INVESTOR DOCUMENTS. THE INTERMEDIARY PORTAL DELIVERS A MORE POWERFUL, TASK ORIENTATED INTERFACE FOR INSTITUTIONS, DISTRIBUTORS, FUND MANAGERS AND FINANCIAL ADVISERS.

The portals are delivered and deployed as a single application package and benefit from a shared set of capabilities. Built on modern technology, taWeb fits seamlessly into clients existing infrastructure enabling high availability, scalability and integration with enterprise security. A responsive UI supports access via tablet, phone or desktop browsers.

Support for multiple client brands on one instance of the solution enables different, bespoke client propositions to be developed with integrated content management for marketing and product messaging. Flexible configuration options include multi-currency, cross-browser compatibility and multi-lingual system support.



INVESTOR PORTAL

The direct to consumer (D2C) portal is intuitive and easy to use, providing direct investors with convenient, real-time access to account data and fund trading. taWeb provides an engaging user experience that encompasses simple navigation, video content and secure messaging. The investor portal is optimised for multi-channel access via on-the-go technology, including smartphones or tablets. It enables fund managers to service their existing customers with an enhanced online application that includes all of the feature-rich and selfservice functionality expected by today's investors. Key functionality includes:

Account access	Self-servicing
New and existing investor registration	Creation and maintenance of regular savings plans
Account summary including portfolio information and current valuation with investment performance and fund allocation breakdown	Fund trading → Buy, sell and switch investments → Top up → New investments
Full transaction histories	Debit card support
Online access to key documents → Statements and contracts notes	ISA top ups
Integrated real time AML and bank account verification	Access to fund documentation – key features and fund prospectus
PCI DSS compliant payment service	Direct communication – secure messaging, email notifications



INTERMEDIARY PORTAL

Built on the same design principles as the investor portal, the intermediary portal provides institutions, distributors, fund managers and financial advisers with a user-friendly, self-service solution and easy access to the most frequently used data. The home page dashboard has been designed with distributors' needs at its core, providing key information on clients, top holdings and recent transactions instantly. There are also customisation options to cater for individual requirements, so each intermediary can personalise the dashboard layout and information as required. Key functionality includes:

Client account access	Self-servicing
Intermediary dashboard → Recently accessed clients → Top 10 clients → Top funds by holdings → Recent transactions	→ Commission enquiry → Distributions history → Payment enquiry → Fund net flow enquiry → Fund allocation breakdown
Investor summary → Client holdings and valuations → Recent transactions	Fund trading → Buy and sell investments → Bulk trade upload
Full transaction histories	Reports dashboard
Online access to key documents → Statements and contracts notes	Direct communication – secure messaging
→ Client specific report → Data download via CSV and XML	



SINGLE SIGN-ON

taWeb has in-built authentication and authorisation security, but can also accept authentication and authorisation from a corporate single sign-on system. This provides a seamless user experience as part of a wider corporate solution; we work with you to confirm your specific integration requirements.



SUPPORTING MULTIPLE SYSTEMS

A key design principle of taWeb is its consolidated data view. taWeb can be configured to provide a common customer experience and journey across multiple core systems.



TAWEB ADMINISTRATOR

Underpinning each of the portals is taWeb's comprehensive administration support. taWeb enables user activity and audit tracking, in-built authentication and authorisation, and document access tracking.

Customer support is enabled through the Customer Service Centre view, that allows administration staff access to account data to support customer queries and an 'impersonation' function allowing navigation of either portal in the context of a specific customer.

It also provides for integrated marketing, brand styling and content management, secure messaging and user access management.



BENEFITING YOUR BUSINESS

Improves operational efficiency – reduces overheads by minimising time spent on telephone enquiries

- Boosts sales and retention – online distribution channels attract new customers and retain existing ones
- Enhances communication – real-time, targeted information to investors
- Increases customer knowledge – tracks website use so you know what matters to your customers
- Strengthens client engagement – personalised environment improves customer satisfaction and retention



ABOUT BRAVURA

At Bravura, software is at the heart of everything we do. We develop innovative technology solutions that power the world's leading financial institutions. We are driven by our corporate purpose – together we create technology that reshapes how organisations and people prosper.

We do this by developing innovative cutting-edge software solutions that become the vital engine powering businesses across the wealth management, pensions and funds administration sectors.

With over 30 years of experience our next generation software solutions help clients increase operational and cost efficiency, enhance their ability to innovate and grow, and minimise their risk, as well as enable them to provide an enhanced level of customer service. Our ever-expanding team across Australia, New Zealand, United Kingdom, Europe, Africa, India and Asia, supports a rapidly growing client base.

Using our global scale and local expertise, combined with our innovative modern technology, Bravura helps power and transform the world's leading financial services businesses, today and for the future.



bravura
solutions