

BRAVURA

SONATA

Bravura Sonata is the administration technology enabling the world's leading advisers, wealth managers, pensions and insurance providers to deliver customised propositions that meet their customers' investment needs. The solution combines Bravura's unique administration, market connectivity and workflow automation technologies to give you a scalable, digital operating model without the business frictions of your legacy systems.

The interoperable solution connects any system, platform and counterparty to automate all, or parts, of your administrative processes so you can eliminate the risks posed by manual processing while surfacing data in real-time to get deeper business and customer insights.

Sonata's flexible design and comprehensive feature set is why it is trusted to support a diverse range of organisations, assets and products across all major jurisdictions. It gives you control over your business enabling you to swiftly implement business decisions, such as launching new products, while the advanced compliance and reporting tools provide you with complete oversight of your operations.

BENEFITS

Customer service

Real-time information and self-service capabilities let you continually refine system performance and adjust your product offering.

Compliant

Sophisticated compliance tools and auto-updates meet all types of regulatory and governance requirements.

Cost and risk managed

Connect any set of systems and team of people to create robust and repeatable end-to-end workflows that lower cost and the risk of error.

Multi bank

Automatically generate payment instructions in any format and send to any bank.

Full range of investment options

Meet client product and asset demands in every jurisdiction.

Implementation experience

Experienced teams understand your goals, automate your key processes and get you live in the fastest possible time.

REAL-TIME BUSINESS PROCESSING

Bravura Sonta is used by the world's leading advisers, wealth managers, pension and insurance providers to simplify their business models and deliver relevant solutions to their customers. We do this by connecting systems and automating processes to create a real-time insights on how to find business efficiencies, improve the customer experience and manage risk.

DELIVERY

The scalable solution can be delivered via the cloud or an en-premise set up, depending on how you like to run your business.

REGISTRY UPDATES

Transaction processing and IBOR updating

From order receipt and confirmation to general ledger updates, we automate the entire transaction process to give you an accurate source of truth.

CONNECTIVITY AND COVERAGE

Full product & asset class coverage

Provide access to the widest range of products and asset types in your jurisdiction, including annuities, bonds, GIAs, ISAs, Kiwi Saver, SIPPs, superannuation funds, umbrella funds and workplace pensions.

New product launches

Self adjust the system and deliver new offerings in days.

Multi format connectivity

Choose how to connect your internal systems and to external counterparts using a wide range of APIs and other traditional formats.

Business optimisation

Orchestration technology, advanced logic, triggers, API ingestion, and eventing, are used to create an automated administration process that lets you create repeatable workflows that surface data faster and move you to exception-only processing.

DATA MANAGEMENT & REPORTING

Flexible reports

Real time insights coupled with a range of standardised and bespoke reporting give you meaningful business insights and your customers transparency over their holdings together.

Reporting includes: tax reclaims, relief scheduling and relief at source, scheme event reporting, transaction reporting and a range of localised regulatory reports.

Data management

Maintain accurate, comprehensive records by automatically capturing, integrating and aggregating data from any source.

Localised compliance

Automated reporting and built-in compliance tools ensure users adhere to local regulations, tax treatments and investor characteristics.

CRM connectivity

Automate the tracking of client interactions, scheduling of follow-ups, and management of client information.

POST TRADE SERVICING

We support all types of asset classes and wrappers with a wide range of asset servicing capabilities. Client portfolios are automatically updated and notifications/reports shared when ready. Key activities are:

- Corporate actions
- Interest processing
- Profit sharing
- With profit investing
- Fixed interest income
- Guarantees
- Liquidity processing

ENGAGEMENT

User-friendly front-end portal

Digital self-service portal gives your customers access to and control over their accounts while enabling you to deliver personalised communications.

Custom branding

White-label the system for a consistent brand experience.

Multi-channel

Let your customers interact with you how they want – email, web, call centre – before feeding all information into your preferred system.

LIFE INSURERS

Bravura Sonata is used by the world's largest life assurance and insurance organisations to automate their entire policy lifecycle. We connect all your customer channels – physical and digital – to your administration platform, digitising your data flow and reducing the cost to serve.

We work with you to understand your business and automate the parts you need help with, including quotations, new business capture, automatic underwriting / policy acceptance and issue, management of policy expiry / maturity, claims processing, general correspondence.

HOW WE DELIVER

Go-live

Our experienced teams employ a tried and tested approach for integration and onboarding projects – some clients go-live in months.

Internal system connectivity

Inbuilt workflow orchestration capability connects and digitalises disparate systems and human workflows. Some clients have used it to achieve operational cost savings of up to 60%.

External connectivity

Bravura Babel connects you to all the fund transaction networks, optimising how you manage your network and giving you a single view over all your customers fund trade information enabling you to easily understand your obligations and reduce the need for large administrative teams.



ABOUT BRAVURA

We have a proven track record. Every month we process £1 trillion's worth of transactions on behalf of global financial institutions. Our market-leading platforms administration and transfer agency platforms, financial messaging (Bravura Babel) and orchestration solutions (Bravura Orchestrator) power mission-critical parts of many of these businesses.

We are trusted not only for the quality of our technology but for its resilience in all market conditions. We are the technology supplier of choice to the leading fund firms, asset servicers and wealth providers, powering the largest firms in these sectors. Our people are recognised for their exceptional know-how in the industry.

We continue to push out the boundaries with a relentless focus on the future, working with our clients and partners to develop innovative solutions that meet the industry's changing requirements.

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