

BRAVURA SONATA

Bravura Sonata is the administration technology behind the world's leading adviser platforms, wealth managers, pension providers and insurers as they seek to optimise their businesses and deliver more personalised solutions without outsourcing control. It enables firms to respond quickly to market change by tailoring products, workflows and reporting, to meet specific client and investor requirements.

Designed to integrate with any front-and back-office system, Sonata streamlines the flow of information to create a unified data environment. It gives firms a complete view of all client and business activity, delivering full visibility across accounts and transactions while surfacing actionable insights to improve performance, reduce risk and lower the cost-to-serve.

Sonata's comprehensive capabilities and flexible configuration support all asset classes, product structures, and tax regimes for any region. Its secure and scalable architecture adapts as client demand changes, giving firms the agility to respond without disruption – enabling long-term growth in a competitive market.

BENEFITS

Enhance client experience

Real-time account visibility, branded digital portals, and multi-channel communication.

Cut costs, gain control

Replace fragmented processes with automated workflows that unify systems and teams, reducing operational spend while enhancing oversight.

Multi-bank

Automatically confirm settlement amounts, generate payment instructions with any bank and communicate to relevant infrastructures (e.g. ATO, HMRC) in any format, including ISO20022.

Asset class coverage

Support all asset class, product, tax and regulatory requirements for clients across the world.

Adapt quickly

Launch new products or make rule changes in days without custom builds or long release cycles.

Compliant

Sophisticated compliance tools and auto-updates ensure you meet localised tax and regulatory requirements across any asset class or customer type.

PROCESSING BUILT FOR INSIGHT AND CONTROL

Bravura Sonata 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. By connecting systems and automating processes firms can quickly optimise business processes, improve the customer experience and manage risk.

FLEXIBLE DELIVERY

Sonata is available as a scalable cloud-based or on-premise solution, allowing you to align deployment with business, region, security and regulatory requirements.

END-TO-END TRANSACTION AUTOMATION

From order capture to settlement to asset servicing and general ledger updates, Sonata automates the full transaction lifecycle. This provides an accurate, real-time source of truth across accounts, positions, and registry records.

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, KiwiSaver, SIPPs, superannuation funds, umbrella funds and workplace pensions. We also support the world's leading insurers with a range of medical, retail and traditional/unitised life products.

Unify business data

Integrates with any data store – including CRM systems, customer contact centres, data warehouses – using your preferred connectivity format for instant information retrieval.

Accelerate product innovation

Rapidly launch and manage new offerings by configuring Sonata directly. Updates to product features, rules, and workflows can be implemented in days to meet shifting customer and regulatory needs.

Connect with full flexibility

Integrates with any internal system, third-party platform and market infrastructure using a wide range of APIs and traditional formats.

DATA MANAGEMENT AND REPORTING

Reporting flexibility

Support any inhouse, client and regulatory reporting requirement by choosing the data you need to stream out for instant consumption instead of running overnight warehouse loads.

Stay compliant across regions

Built-in rules engines and localisation logic ensure adherence to region-specific regulations, tax treatments, and investor eligibility requirements.

Streamline client engagement

Automate CRM connectivity to track interactions, schedule follow-ups, and manage customer data—all within your preferred ecosystem.

POST-TRADE SERVICING

Automate post-trade servicing to maintain accurate portfolios and notify clients instantly. Key capabilities include:

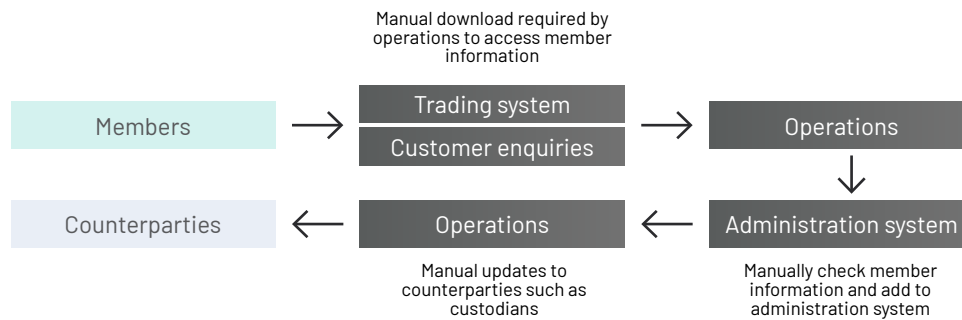
- Corporate actions
- Interest and dividend processing
- Profit sharing and with-profits investing
- Fixed income and guaranteed products
- Liquidity and cash flow management

BUILT FOR LIFE INSURERS

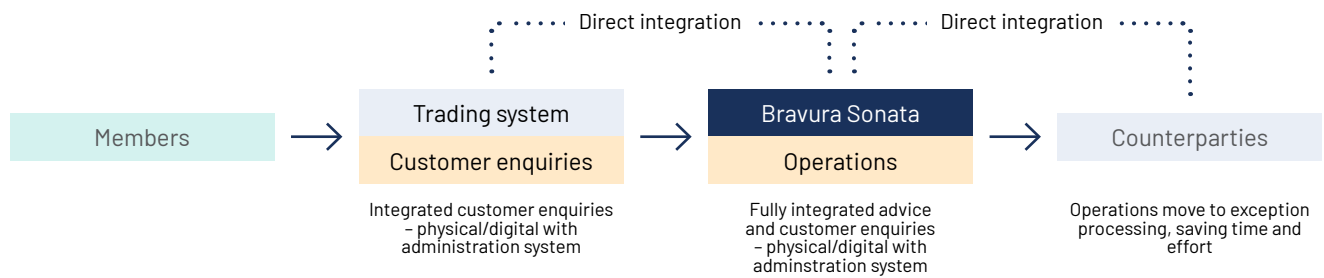
Bravura Sonata is trusted by the world's leading life assurance and insurance providers to automate the entire policy lifecycle. The platform connects physical and digital customer channels directly to your administration engine, enabling complete data digitisation and a lower cost-to-serve model. Support includes:

- Quotation and new business capture
- Automated underwriting and policy issuance
- Ongoing policy servicing, renewals, and maturity
- Claims management and correspondence tracking

BEFORE BRAVURA SONATA



WITH BRAVURA SONATA



HOW WE DELIVER

Our experienced teams use a proven methodology to deliver integration and onboarding projects at pace—many clients go live within months. Books of business are migrated in tranches to ensure business continuity, minimise risk, and allow for thorough testing and refinement ahead of full deployment.



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.

Find out more: contactus@bravurasolutions.com



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