

## Raising the game in client reporting

### We believe that information is beautiful. Is yours?

Client reporting has never been more important for financial organisations. Increased regulation has created a huge operational burden and the growing role of permission marketing means that every opportunity to talk directly to customers must be exploited to its full potential. Kurtosys Reporting will help turn obligation into opportunity, cutting through compliance concerns to enhance business efficiency, reduce costs and create outstanding client reports.

Kurtosys Reporting provides a complete end-to-end solution for report design, customisation, data collection and distribution. We offer unrivalled flexibility and significant reductions in cost, risk and effort compared to in-house production. We've combined state of the art technology with the experience of our asset management specialists to create fully scalable, out-of-the-box solutions that truly allow you to deliver more for less.

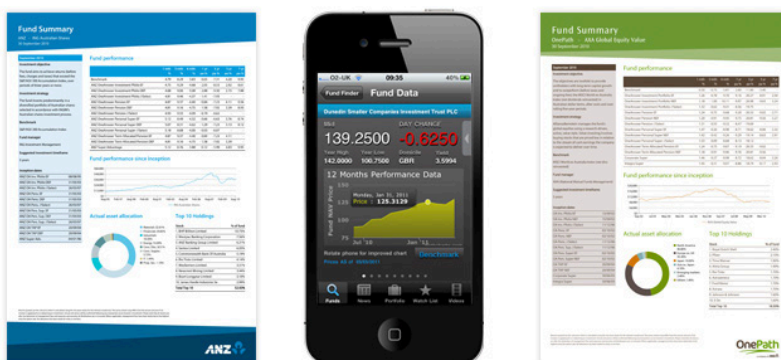
### How do your client reports measure up?

## Features

- ✓ Browser-based applications – 100% thin-client
- ✓ Content-rich documents, financial tables and charts in PDF, Powerpoint, Excel, HTML, Word
- ✓ High-quality rendering with Adobe InDesign® Server, with complete control over layout and styling
- ✓ Capture data from vendor feeds, databases and files
- ✓ Data validation, processing and aggregation
- ✓ Integrated workflow engine: Scheduled or ad-hoc document generation
- ✓ Role-based permissions, email notifications, content expiry and batch publishing
- ✓ Document history and versioning, approval process for compliance, secure login and password encryption

“As part of improving the quality and timeliness of OnePath’s investment reporting to our clients, we set stringent requirements to meet clients’ expectations and OnePath’s tight brand transition timetable. During the onboarding service, Kurtosys provided us with best practice guidelines for assembling data and content in a structured way that enabled a simple configuration of the service to meet OnePath’s production needs. I am pleased to say this was achieved on time and we are now looking to Kurtosys to provide other reporting services across the group.”

**Stewart Brentnall, Chief Investment Officer at OnePath**



## For further information

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