

TELESTO...



WEALTH MANAGEMENT SYSTEM

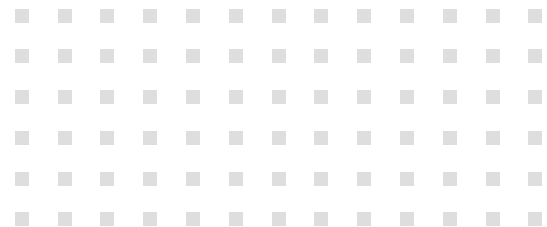




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Comprehensive suite supporting entire wealth management lifecycle

Robust technology platform adhering to technology requirements of some of the world's largest banks

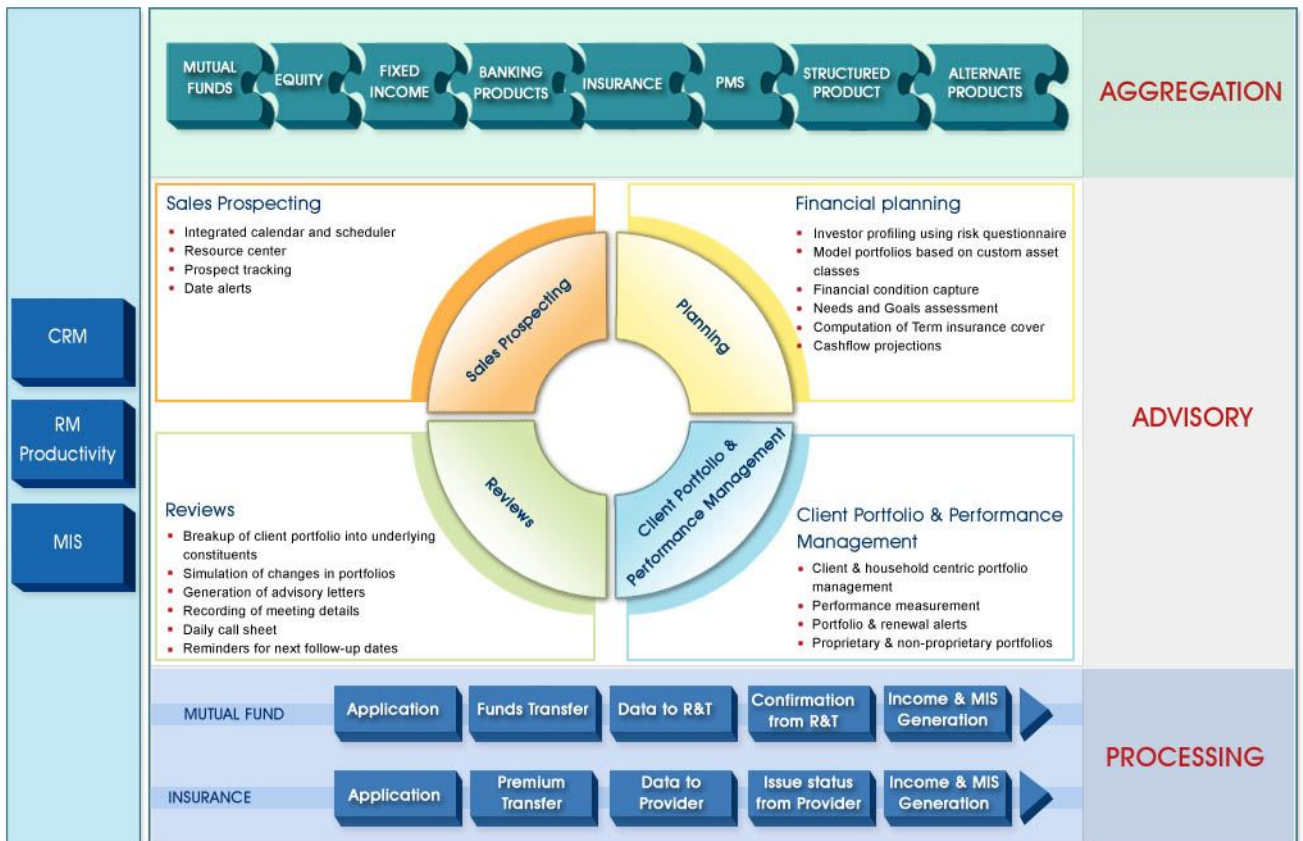
1.0 Telesto Overview

Telesto is a suite of products across the wealth management lifecycle and is tailored for use of Relationship Managers of Private Banks and Wealth Managers. The product is proven, scalable, and provides the technology that allows firms to increase their level of customer service, reduce costs and enhance revenue. **Telesto** captures all the pertinent information about your clients with a true household view and helps define your clients' goals, generate investment proposals, calculate performance and produce elegant customized reports.

The entire wealth management lifecycle is supported: commencing from prospecting, risk profiling and suitability assessment, financial planning to order placement and reporting. Add-on modules include the capability to generate and reconcile income from mutual fund and insurance transactions and portfolio.

Telesto's wealth management platform was designed to meet the technology requirements of the largest financial institutions. The use of technologies such as J2EE built in a Struts framework allows for the delivery of highly scalable solutions tailored to the needs of banks with a large customer base.

The intranet nature of the application allows organizations the ability to rapidly add relationship manager desktops and leverage existing legacy systems. The architecture enables functions such as security, role-based profiling, and access control.



The set of tools available in Telesto allow the RMs to guide a client through the entire investment process.

Highly configurable uploads allowing for batch integration with diverse platforms

Some of the banking software platforms integrated with include Infosys's Finacle, iFlex's Flexcube, CSC's HOGAN

2.0 Data Aggregation & Reports

Telesto, at its core, has a data aggregation module. This module forms the base of its advisory activities. The main purpose of this module is to collect data from different systems for different products so as to have one consolidated snapshot of the client's portfolio. The data can be collected either through uploads or data entry.



3.0 Challenges that Institutions face

Lack of a single repository of

- ◆ Clients' financial relationship with the institution
- ◆ All of the Relationship managers' interactions with the clients

4.0 Telesto Solution

- ◆ Provides a single view of customer portfolio and transactions in investments area.
- ◆ Provides an integrated solution for Risk Profiling, Financial Planning and Investment Review.
- ◆ Investment Modeling and Management.
- ◆ Customer Relationship Management.
- ◆ Allows incorrect data identification and correction.
- ◆ Facility for printing client reports that can be shared with the client.



- ◆ Single point investment and business management tool for Relationship Managers.
- ◆ Allows for corporate memory for risk profiling, financial planning & investment reviews.

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