

Tech and admin sorted – so you can focus on members

Automated Super Admin

iress.com/automated-super-admin



Tell me how it will help me

Tell me what it actually does

Over recent years, the superannuation industry has undergone a significant amount of change in regulation and member needs and expectations.

With this shift, the decision between focusing on differentiated product offerings and member experience or technology and administration will become increasingly important for super funds.

Automated Super Admin provides super funds with software and services that allow them to insource their front-office, while outsourcing their back-office admin to Iress. This helps to reduce the risk associated with human admin errors and provides efficiency at scale as super funds grow—addressing the automation challenge.

Automated Super Admin takes care of both building the tech and maintaining it, leaving super funds to focus their efforts where it counts: on their members.

Automated Super Admin is a complete digital offering supporting the day-to-day, back-office maintenance of superannuation funds.

With full access to information, super funds can use their data and improve or integrate their business processes. Super funds also retain control of their content and messaging across all channels to further enhance member experience.



Can you break it down for me?

Automated Super Admin is an integrated technology ecosystem consisting of software and admin services and has the following components:



Acurity Registry

This managed and hosted registry software drives administrative efficiency and enables speed-to-market for new products and services.

Accessible 24/7 via your web browser, the software supports a wide range of product types including defined benefit, accumulation, pension and hybrid products. It also supports a range of investment requirements such as direct equities, term deposits and managed funds.

The intuitive interface makes it easy to process transactions such as investment switches, benefit payments and other general member maintenance. These can then be actioned by your administrator or, through Acurity Online (or your own member portal) for your members to self-serve—driving efficiency and reducing the risk associated with keying errors.

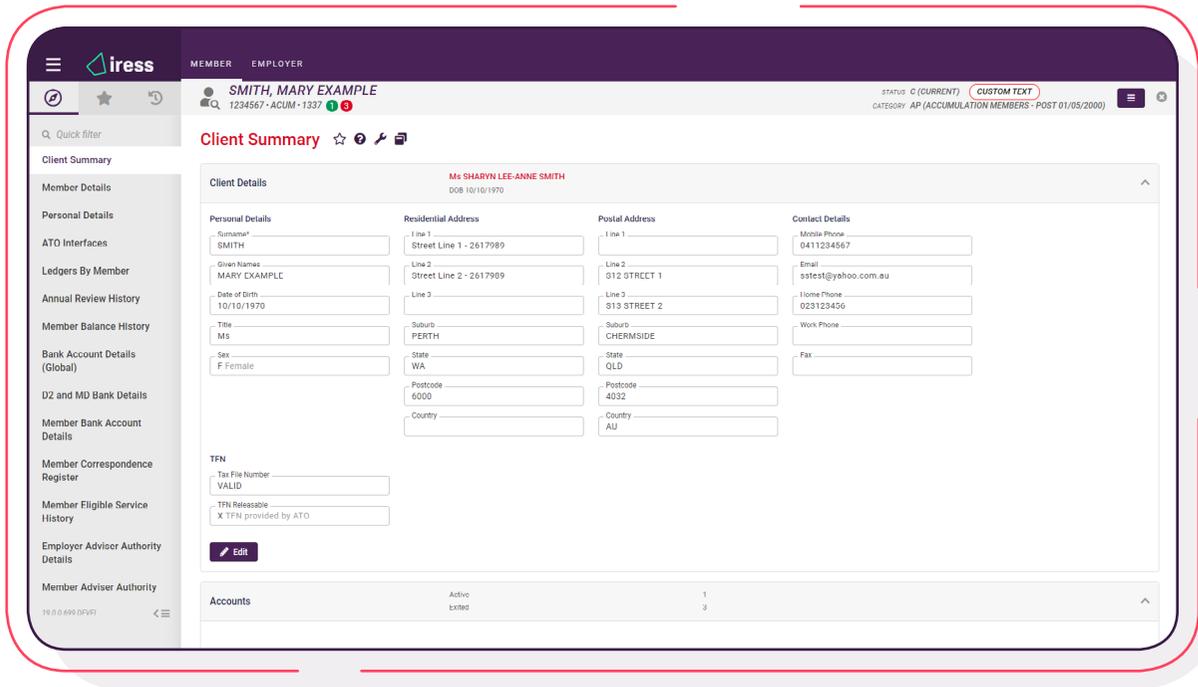
Acurity Online

Acurity Online is a fully transactional, branded and online portal for superannuation members, employers, advisers and administrators. It allows you to retain control of your portals while Iress manages hosting and integration back to your registry.

- **Member portal:** Delivers high levels of straight-through processing for a wide range of transactions. It fully integrates with the Acurity Registry software and allows members to view, edit and transact via desktop, tablet or mobile 24/7.
- **Employer portal:** Allows employers to process contribution files, search for members and view and update details such as personal information and salaries.
- **Adviser portal:** Provides advisers with access to the member portal for those members linked to them. There is also a range of reports the adviser can access such as balances for all members and members by investment.

Unlike typical white-labelled, out-of-the-box software, Acurity Online has an in-built content management system (CMS) allowing you to stay in control. You can use the CMS to change content, update messaging and segment your members—enabling you to deliver tailored content to different member groups. The channel of communication can be adjusted by using if-conditions, and push notifications can be activated—allowing members to receive confirmation of their actions within their super account.

Save on your technology budget and focus on appropriately branding your portal for maximum impact and return. Have your portal functioning and looking exactly as you require.



Acurity Client Summary—view, maintain and update member details all in one place.

CRM & workflow

Provides a single view of a member's profile, including work in progress, previous transactions and all correspondence. It seamlessly integrates to Acurity Online, allowing your staff (e.g.: call centre or customer service) to view a member's profile exactly as it appears on screen for a member (subject to security) and transact on the member's behalf if required.

Analytics & business intelligence

Allows you to access all of your data and a range of dashboards to assist with transactional service level agreement (SLA) reporting. This unfettered access also allows you to integrate with your preferred business intelligence solution.

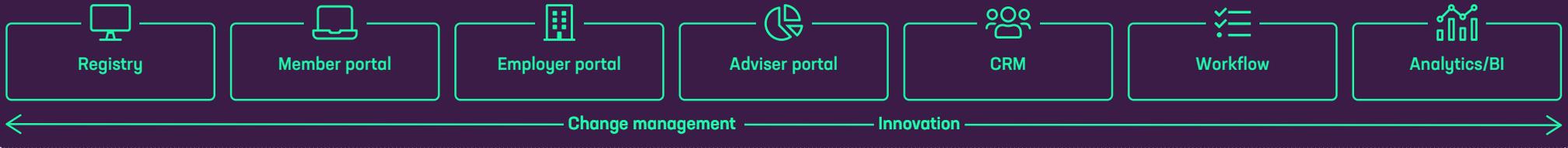
Capabilities

- Account maintenance
- Money in & money out
- Investment processing
- Member communication management
- Risk compliance
- Fund finance

Can you draw a picture for me?

Automated Super Admin services

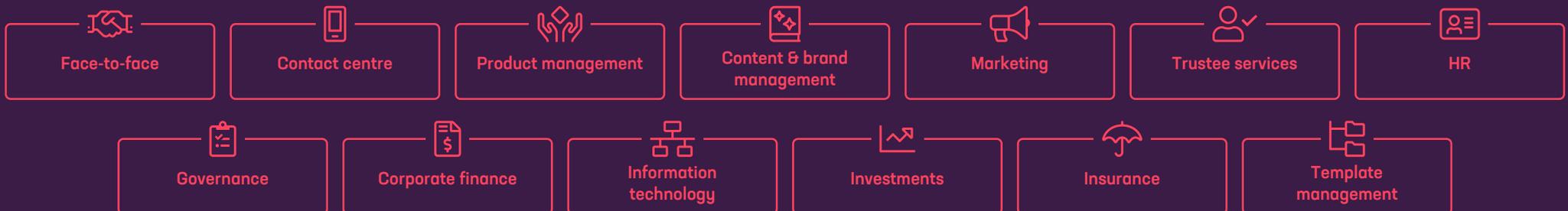
Integrated technology ecosystem



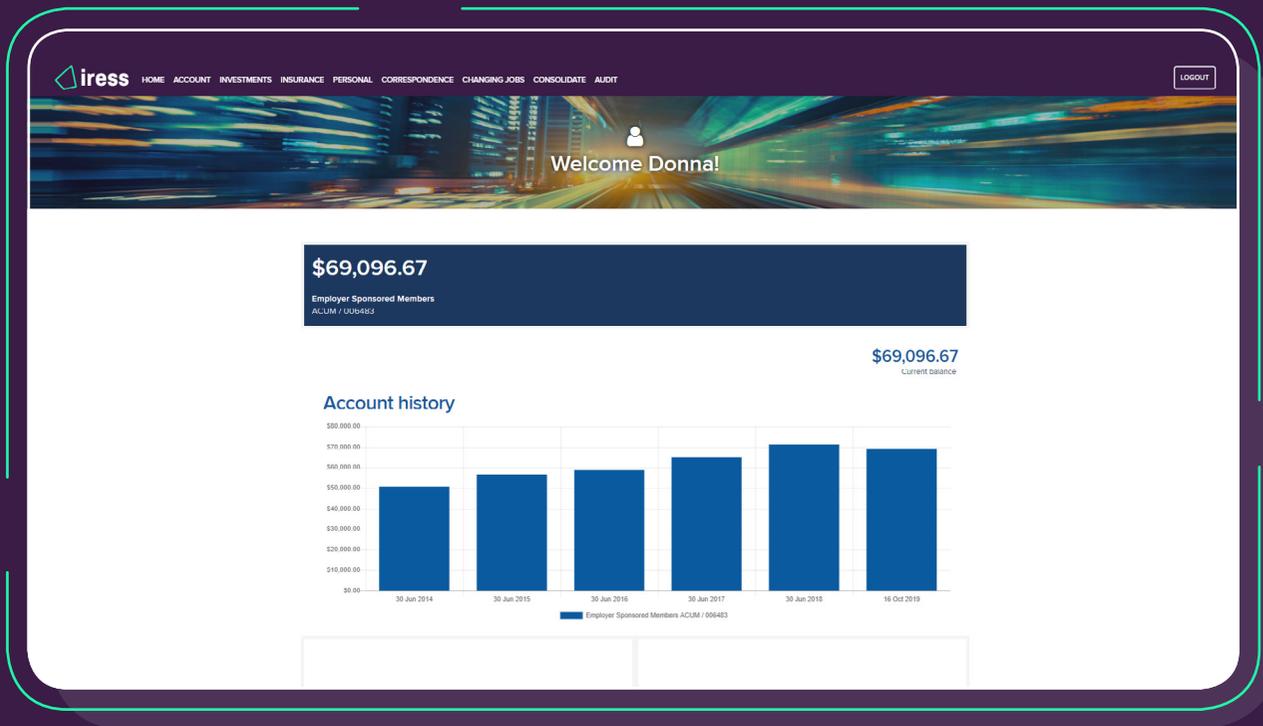
Administration services



Superannuation Fund retained services



Give me six reasons why I should use it



Dashboard for members to update details, manage investments, make contributions and more—online 24/7.

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Tech & back-office sorted

Covers all aspects of super admin so you can focus on member engagement.

Retain front-office control

Allows you to access, create, upload and send your own content and messaging across all channels without contacting Iress.

Digital-first design operating model

Provides your members 24/7 access with rich and accessible self-serve options, and automates your admin—including both straight-through and exception-based processing.

Full data access

Provides access to your data when and where you want it, at no extra cost.

Open integration

Allows for easy integration with any third-party vendor.

Certainty of cost

Both technical and legislative updates are included as standard in the up-front pricing model.

Is there any other important information?

Open integration

Automated Super Admin is a hosted, managed service, including the integration with Iress' workflow system.

The software and services are designed so you have access to all of your data at any time, without having to request permission from Iress. The open APIs provide a seamless process when integrating with external applications.

You also have the option to add in access to Iress' financial advice and content software including Xplan, Xplan Prime, Automated Personal Advice and Financial Knowledge Centre. These software offerings provide seamless delivery of financial advice and content via native integration with Acurity Registry, Acurity Online and advice applications, plus access to a wide range of educational and planning tools.

Beneficiary details can be updated online.



The screenshot shows the 'Beneficiaries' page in the Iress Automated Super Admin. At the top, there is a navigation bar with the Iress logo and links for HOME, ACCOUNT, INVESTMENTS, INSURANCE, PERSONAL, CORRESPONDENCE, CHANGING JOBS, and CONSOLIDATE. The user's name 'Dorrie Turner - ACUM / 006483' and a LOGOUT button are on the right. The main content area features a blue header with the title 'Beneficiaries'. Below this, a dark blue box displays the account balance '\$69,096.67' for 'Employer Sponsored Members' (ACUM / 006483). A section titled 'Preferred Beneficiary Nomination' contains a table with one entry: 'D DEPENDANT' (100.00%, Spouse / De-Facto, Preferred). Below the table is a paragraph explaining that the Trustee will take the user's wishes into account but is not bound by the nomination. A blue button labeled 'Update preferred beneficiary nominations' is provided. The 'Binding Beneficiary Nomination' section includes a paragraph stating that a death benefit nomination form must be signed and witnessed, and a blue button labeled 'Binding death benefit nomination form' is available.

What about service and support?

We understand providing great service and support goes hand-in-hand with delivering great software.

We pride ourselves on our thorough and timely implementations, reliable and scalable hosting services, robust back-up and recovery procedures, and ISO/IEC certified information security management.

Our expert-led support team, training programs and online user community all help our users get the most out of our software.

How does Iress stack up as a technology partner?

Every day, more than 9,000 financial services businesses use our software to make better decisions and deliver better results. We know they don't just expect software that works, they also want a technology partner that works with them.

Leveraging our industry knowledge and global experience working with clients just like you, we design, develop and deliver creative, reliable software that does what you need it to.

At Iress, we believe technology should help people perform better every day.



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