

For efficient admin with reg updates included.

Acurity Registry

iress.com/acurity-registry



Tell me how it will help me

Acurity Registry easily supports a wide range of investment options, insurance designs, fee structures and more—it reduces risk, streamlines processes and automates back-end processing to drive administration efficiency.

Acurity Registry supports all of your products including defined benefit, accumulation, pension and hybrid funds. It allows you to consolidate legacy or disparate systems and have all products on a single registry, reducing the cost of supporting multiple systems and provides easier access to your data.

High levels of automation ensure that transactions, such as contributions processing, are largely handled by the platform, with your valuable staff only handling exceptions. This allows you to reallocate staff from processing roles to member engagement roles, to deliver better services to your members.

Tell me what it actually does

Available as hosted or on-premise software, this full-featured registry platform drives administrative efficiency and enables speed-to-market for new products and services.

Accessible 24/7 via your web browser, the platform 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 risk associated with keying errors.



“

The choice to implement Acurity was based on a range of challenges including cost-effectiveness, efficiency levels and importantly, we were looking for best practice guidance on how to remain innovative for members and employers. With Iress we will be able to deliver levels of business transformation that were not possible on our previous platform.”

Vision Super



Can you break it down for me?



Contributions workbench

Provides a series of validations and matching rules allowing you to automate transactions. This has seen up to a 95% increase in straight-through-processing for contribution processing, with the platform providing an easy to use interface to address exceptions.

Insurance module

Supports a wide range of policy designs for TPD, death, and salary continuance. Premiums and cover are highly configurable and the module includes support for dollar-based, unit-based, percentage-based and other types of policies.

General ledger

Drives data integrity and interfaces to a wide variety of external ledger packages to support financial reporting.

Highly configurable

Allows you to differentiate in the marketplace without the requirement for bespoke development. The platform supports a wide range of:

- **Fee options:** Dollar-based, asset-based, hybrid, capped and family rate.
- **Investment options:** Pooled trusts, direct investments in shares and ETFs.
- **Product types:** Defined benefit, accumulation, hybrid, pension, non-super trusts and more.

Regulatory updates included

Provides you with up-to-date software—based on legislative requirements—ensuring you're always compliant. Our compliance and development teams monitor legislation and automatically deliver software updates, at no extra cost.

Integrates with 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 the registry. Unlike typical white-labelled, out-of-the-box software, Acurity Online has an inbuilt content management system (CMS) allowing you to stay in control. You can use the CMS to change content, update messaging and segment your members—allowing you to deliver tailored content to different member groups.

MEMBER

Mr INKLEY, ADAM WILLIAM
30 • DEMO • 000031

STATUS: C (CURRENT)
CATEGORY: A1 (SUPERANNUATION)

Client Summary ☆

Client Details Mr Adam William Inkley
DOB 22/01/1970

Personal Details	Residential Address	Postal Address	Contact Details
Surname* Inkley	Address 1 5 Charles Street	Address 1 PO Box 42	Mobile Phone
Given Names Adam William	Address 2 5 Charles Street	Address 2 PO Box 42	Email demo@example.com
Date of Birth 22/01/1970	Address 3	Address 3	Home Phone
Title Mr	Suburb Melbourne	Suburb Melbourne	Work Phone
Sex M Male	State VIC	State VIC	Fax
TFN Tax File Number VALID	Postcode 3000	Postcode 3000	
TFN Releasable Y Release for Tax and Surcharge purpo...	Country Australia	Country Australia	

[Edit](#)

19.0.0.467 DEVEL

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

Integrates with SuperConnector

SuperConnector is a verified SuperStream gateway that enables the transfer of messages between employers, super funds and the ATO, enabling you to meet your superannuation compliance and reporting obligations.

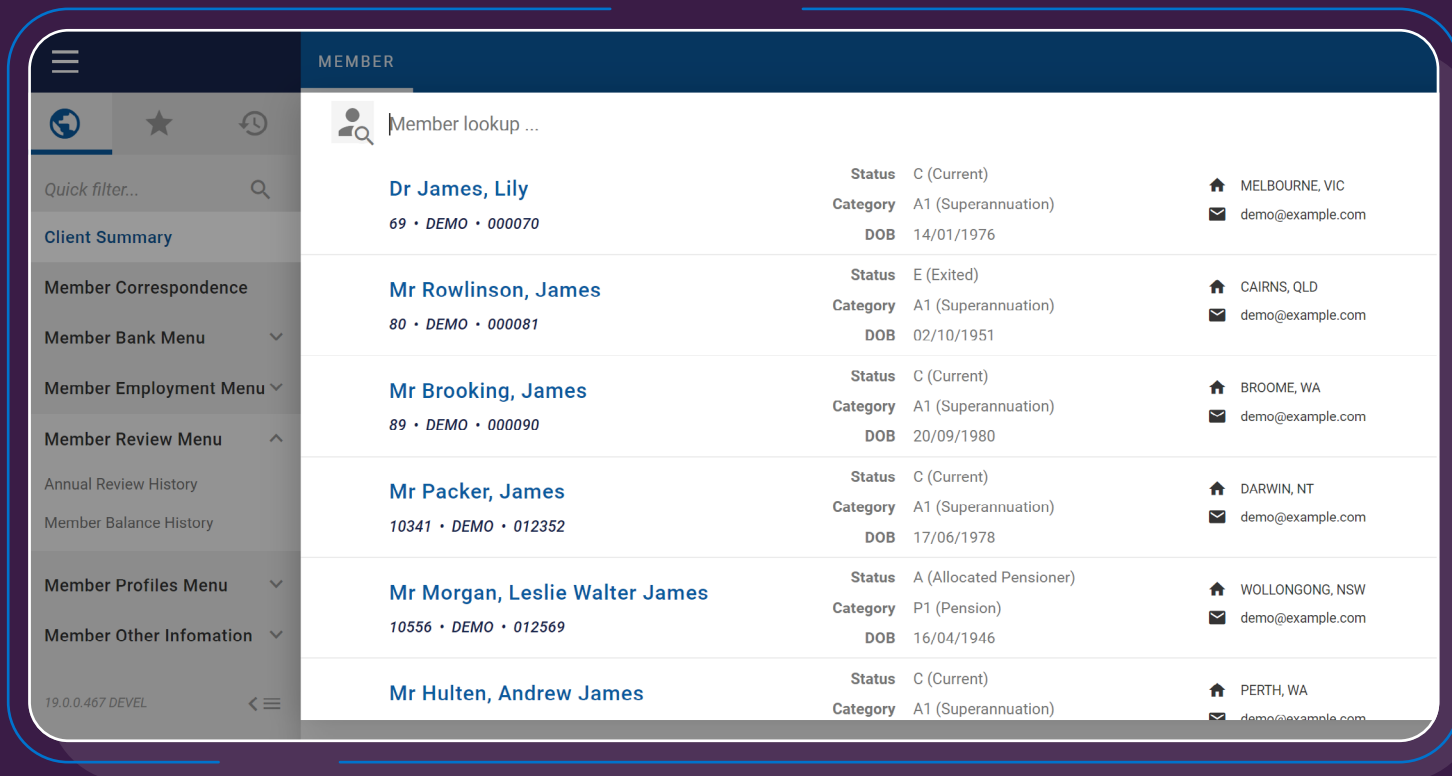
SuperConnector saves super funds time and money, increasing automation by facilitating message transfers in compliance with the SuperStream Data and Payment Standard, and Standard Business Reporting (SBR) standards. This means the quality of the data reaching super funds is improved, risk is reduced and data transmission is both seamless and secure.

Access to data

Supports your marketing and reporting teams by allowing you to access, blend, explore and analyse data without relying on IT or data experts. This includes integration to Lumen—Iress' data analytics and compliance software—which enables you to efficiently and effectively meet financial advice compliance and regulatory obligations.



Give me four reasons why I should use it



The screenshot displays the 'MEMBER' section of the Acurity Registry interface. It features a search bar at the top with the text 'Member lookup ...'. Below the search bar, a list of members is shown, each with their name, ID, status, category, and contact information. The interface includes a sidebar with navigation options like 'Client Summary', 'Member Correspondence', 'Member Bank Menu', 'Member Employment Menu', 'Member Review Menu', 'Annual Review History', 'Member Balance History', 'Member Profiles Menu', and 'Member Other Information'. The bottom of the sidebar shows the version '19.0.0.467 DEVEL'.

MEMBER	Status	Category	DOB	Location	Contact
Dr James, Lily 69 • DEMO • 000070	C (Current)	A1 (Superannuation)	14/01/1976	MELBOURNE, VIC	demo@example.com
Mr Rowlinson, James 80 • DEMO • 000081	E (Exited)	A1 (Superannuation)	02/10/1951	CAIRNS, QLD	demo@example.com
Mr Brooking, James 89 • DEMO • 000090	C (Current)	A1 (Superannuation)	20/09/1980	BROOME, WA	demo@example.com
Mr Packer, James 10341 • DEMO • 012352	C (Current)	A1 (Superannuation)	17/06/1978	DARWIN, NT	demo@example.com
Mr Morgan, Leslie Walter James 10556 • DEMO • 012569	A (Allocated Pensioner)	P1 (Pension)	16/04/1946	WOLLONGONG, NSW	demo@example.com
Mr Hulten, Andrew James	C (Current)	A1 (Superannuation)		PERTH, WA	demo@example.com

Acurity Search—an intuitive search function that also shows the records recently viewed.

1

Built-in legislative and compliance updates

Reduces risk and associated costs through the provision of hundreds of legislative and compliance updates.

2

Straight-through and exception-based processing

Saves time so your staff can concentrate on servicing your members more.

3

Decommission disparate systems

Reduces the cost to your business.

4

Highly configurable

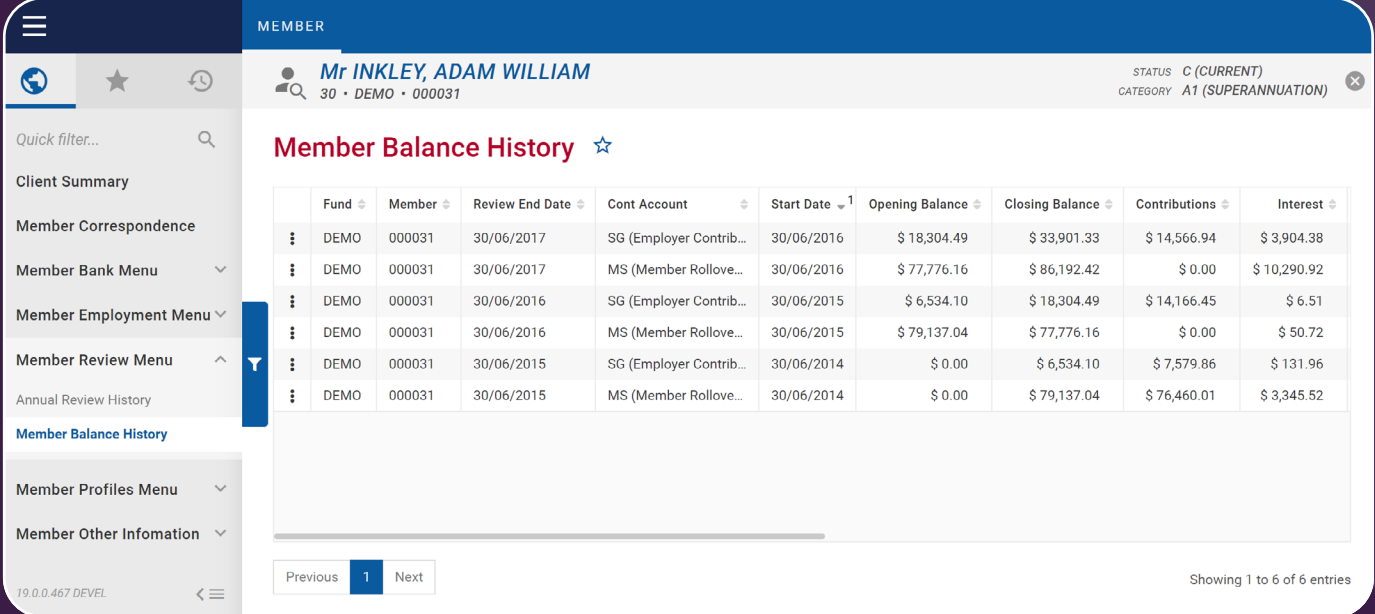
Provides you with the means to better meet both your needs as a fund administrator and the needs of your members.

Is there any other important information?

Open integration

With an open architecture, you can easily plug and play with any third-party including, regulatory bodies such as APRA and the ATO, plus trustees, insurers, brokers, custodians, customer relationship management (CRM) systems and external ledgers; and even other fintech providers. These integrations reduce risk, enable online transactions and ensure the secure transmission of data, leaving your staff to deal only with administration exceptions.

Additionally, Acurity natively integrates with other Iress software including SuperConnector, Robo Advice, Xplan, Xplan Prime and Financial Knowledge Centre, to provide your members with a range of educational, advice and data compliance offerings.



Fund	Member	Review End Date	Cont Account	Start Date	Opening Balance	Closing Balance	Contributions	Interest
DEMO	000031	30/06/2017	SG (Employer Contrib...	30/06/2016	\$ 18,304.49	\$ 33,901.33	\$ 14,566.94	\$ 3,904.38
DEMO	000031	30/06/2017	MS (Member Rollove...	30/06/2016	\$ 77,776.16	\$ 86,192.42	\$ 0.00	\$ 10,290.92
DEMO	000031	30/06/2016	SG (Employer Contrib...	30/06/2015	\$ 6,534.10	\$ 18,304.49	\$ 14,166.45	\$ 6.51
DEMO	000031	30/06/2016	MS (Member Rollove...	30/06/2015	\$ 79,137.04	\$ 77,776.16	\$ 0.00	\$ 50.72
DEMO	000031	30/06/2015	SG (Employer Contrib...	30/06/2014	\$ 0.00	\$ 6,534.10	\$ 7,579.86	\$ 131.96
DEMO	000031	30/06/2015	MS (Member Rollove...	30/06/2014	\$ 0.00	\$ 79,137.04	\$ 76,460.01	\$ 3,345.52

Acurity Balance History—Acurity maintains a full record of the member's contributions and balance movements.

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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