

Selecting the right software package is a difficult task. So you need to ask yourself the question...

# Why UNITY?



## Why UNITY Elements?

UNITY Elements can meet the key challenges faced by firms in the Wealth Management industry.

### Improved Efficiency

UNITY Elements helps you accomplish your tasks with a minimum expenditure of time and effort. The following features are specifically designed to improve efficiency:

- 'Client file' style user interface
- Keyboard-driven transaction entry
- Straight-through processing from bank to books
- Presentation quality financial statement production
- Automated invoice production

### Management of Risk

Good data management is a key tool in the management of risk. The following processes were built to meet regulatory requirements using the UNITY Task Manager:

- Risk Rating - helps to remove personal bias
- Payment management - creates tighter control
- Client take-on & KYC - ensures consistent set-up

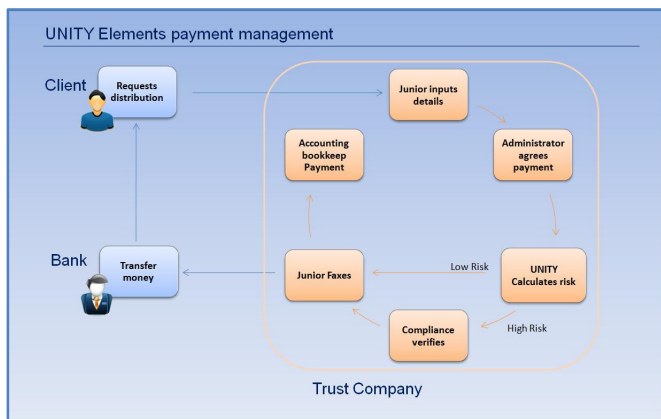
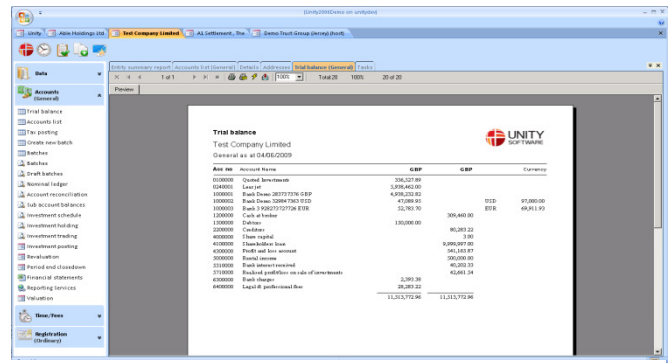


Diagram to show the conceptual flow of the payment management task

### Adapting to Change

Changes in the structure and regulation of the Wealth Management industry mean you have to be able to adapt to survive. The following features ensure this is possible:

- User-definable language & site dictionary customisation
- User-driven ad-hoc reporting
- Integrate Web applications into Elements interface
- Tasks & data pages allow new site-based functionality



Screenshot of the Elements user interface showing a Trial Balance

## Why UNITY Software Ltd?

When choosing a product you are also choosing the company. Over the last 10 years our experience in the Wealth Management industry and our 'keep it simple' approach have paid dividends in creating a stable company with a stable product.

### Partnership Approach

Experience has shown us that working with our clients as partners achieves the best results. We maintain this relationship with dedicated client relationship managers and systems to track support issues and enhancement requests.

### Pricing Policy

- No capital charge. Annual charge only
- Increase & decrease licences at any time
- Mix full, read-only and concurrent licences
- Upgrades included in the annual charge

### Company Experience

- 10 years continuous management
- Principals with over 50 years experience
- Clients in 15 jurisdictions
- Offices in Geneva & Jersey

### Technical Support staff

All of our technical support staff are recruited from the finance industry and are required to have industry recognised qualifications which means they understand your business.

## Summary

Hopefully we have demonstrated **WHY** UNITY Elements is worth considering. Given an hour of your time we would like to show you **HOW** UNITY Elements can help your company. We would be delighted to have the opportunity to do a demonstration in person or over the Internet.