

REWRITING THE FUTURE OF COMPLIANT SUITABILITY REPORTS



Key Benefits

Create Highly Personalised Reports

ATEB Suitability's intuitive and dynamic wizard guides the user through a process that 'glues' the advice to the client's circumstances, giving you a truly personalised output.

Customise your own Templates

ATEB Suitability allows you to create a perfectly formatted suitability report in your own house style, with customised content, in line with your preferences consistently every time.

Complete 'Compliance' Peace of Mind

ATEB Suitability has been developed by Compliance Specialists and focuses on relevant content to produce a 'TCF friendly' output which has been examined by the FCA during numerous visits over the years with only positive feedback.

24/7 Remote Access

Providing you have internet access and a password, you can simply log on wherever you are in the world, at any time 24 hours a day, 7 days a week, there's no need for installation

Save Time & Money

Free up valuable adviser time, reduce the need to re-key information, dynamically remove or add relevant content quickly, reduce mistakes, eliminate the need to re-format resulting in average production time and rates being reduced, ultimately leading to extensive cost savings.

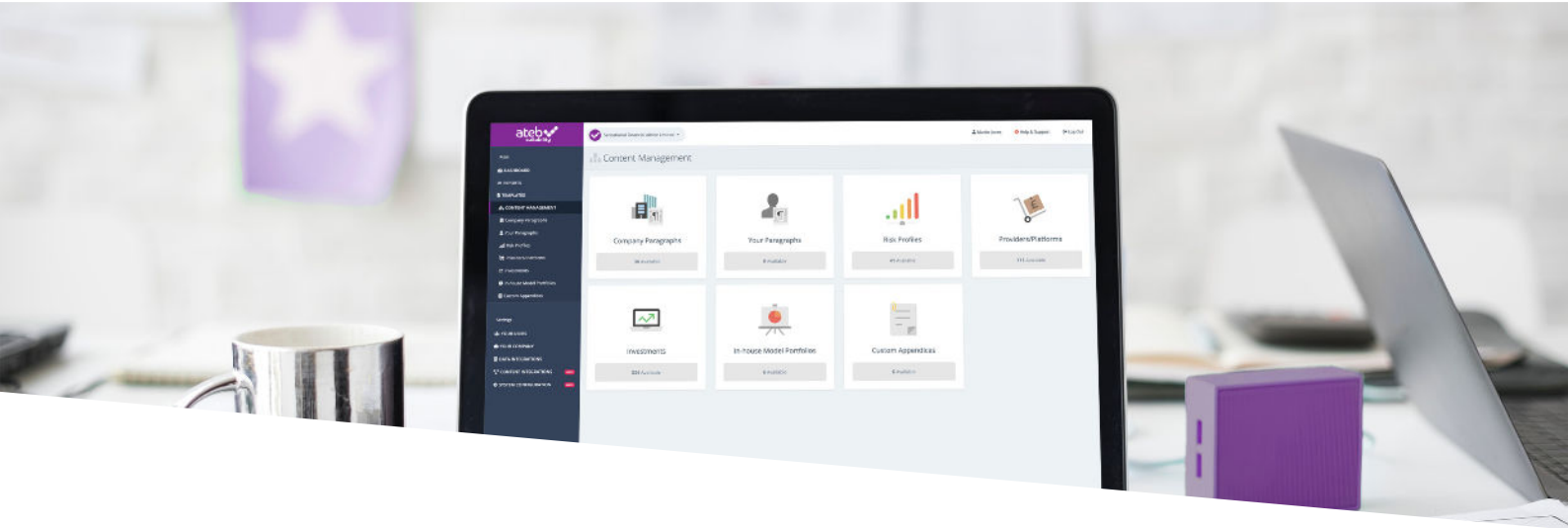
Intelligent Suitability Report Generator for Financial Advisers

ATEB Suitability is an intelligent multi-product suitability report generator designed to offer Financial Advisers a simple, yet comprehensive tool, to help streamline their advice process. ATEB Suitability will give you a smarter, more cost effective and compliant approach to producing your suitability reports.

Why Choose ATEB Suitability?

ATEB Suitability has been developed using cutting edge intelligent document creation software, combined with the expertise of leading compliance experts, to offer a fresh approach to the production of suitability reports which are both comprehensive and personalised.

ATEB Suitability's templates, which have proven compliance track record provide a unique solution to the long standing problem associated with suitability report generation.



Key Features

Intuitive and dynamic wizard

A systematic, step-by-step, intuitive wizard dynamically changes the report content depending on user input. The outcome being that each report will be unique to each client!

Regular prompts

The wizard will prompt you for numerous 'reasons' throughout, giving an unsurpassed opportunity to personalise, this is what gives the output a unique feeling. You should always aim to place the client firmly at the scene of the advice.

Complete the sentence prompts

The system makes it easy for you to put into words the personalised elements (linking features to client's circumstances to create benefits) by allowing the completion of a sentence.

'Free text' prompts

We accept that we may not always be able to offer you the text that you need so there are lots of prompts for free text.

Phrases promote 'reasons why' rather than 'reasons what'

You select phrases such as 'because you are' rather than 'if you are

Multi-product report capability with comprehensive content

Multiple sales can be included within the same suitability report. We have made available a wide selection of product templates with comprehensive content; however this content can be altered and amended to suit individual and company preferences using the wizard, tabs and storage facilities within the system.

Apply your own 'House Style'

Choose your own font, style and upload your logo to create a perfectly formatted suitability report.

Build your own template with 'Content Tabs'

Build your own individual suitability report templates from 'content tabs' within the wizard. This way you decide what you want to include. For example you may wish to include an attitude to risk per product (i.e. different for Investment Bond and OEIC) or a single attitude to risk for a particular area of your recommendation as a whole such as investment.

Save your favourite paragraphs

As you go through the suitability report wizard you may wish store favourite paragraphs such as your opening paragraph or something about your company, these can then be accessed for future use without the need to re-key. These can be stored on a company or individual level.

Save your customised templates

The system allows you to set up customised templates. These can then be stored and accessed for future use.

Personalised risk profiles

This allows risk profiles to be defined at a company level, ensuring that a consistent approach to risk is sustained whilst using the ATEB Suitability product.

Combine/add generic or technical information in word or PDF as part of appendix

If you have extra information such as 'Fund reports' that you wish to add, then we suggest this can be done in word by downloading to your desktop first and simply combining in PDF or word as an appendix. We recommend that you check this process with your own compliance and IT support as this will be specific to your organisation.