

Transforming the way your customers perceive your financial planning services

Reduce time and costs when providing financial planning services to your customers while you enhance customer interaction, increase customer satisfaction, and add business value all across your value chain.

Looking through financial data can be a daunting and confusing endeavour. Information is often not presented in a user friendly way, or is simply too convoluted in its presentation. The result? It's hard to engage your customers to spend time interacting with their financial data.

Legacy systems are hindering customer retention and growth in the life and pension industry, as customers seek better, more modern ways of interacting with their financial data. A failure to let go of legacy will result in an exodus of customers to smarter, more agile platforms and services.

Future-Ready

Advisors today need intelligent planning tools that emphasise accuracy, flexibility and ease of understanding. Likewise, for their customers to become more engaged and take an active role in managing their portfolios, they need clear overviews, ease-of-use tools and flexible planning options.



8I40	57.230	0.57	+0.03▲	587.45	0.007%	250.000
4NA5	81.058	4.35	-2.09▼	158.03	1.561%	375.000
3V17	62.985	2.07	+1.17▲	816.59	5.032%	621.000
7BE3	37.278	0.14	+0.72▲	634.27	3.884%	368.000
8421	84.107	-0.73	-0.51▼	538.01	2.416%	743.000
YT64	21.744	5.63	+3.16▲	692.36	0.657%	405.000
I897	13.361	1.82	-1.23▼	237.98	0.103%	882.000

Obex

Complexity made simple

Keylane Obex is a SaaS (Software-as-a-Service) platform that empowers financial and pension service companies of all sizes to offer their customers unrivalled control and configurability of their portfolios. It provides

a holistic view of customer financial data, which helps advisors to walk their customers through their financial overviews more easily. This saves time, reduces costs and facilitates better customer interactions and experiences.

Coupled with the ability to turn calculations into easy to follow visual presentations, such as graphs, charts and diagrams, Obex very much encourages the ethos of "show don't tell".

API Enabled

Keylane Obex not only integrates with your on-premise systems, but also connects to external online services through an API (Application Programming Interface) - software intermediaries that allows two applications to talk to each other. For example, when you check the weather via facebook

or send a private message over Instagram, you are using an API. The Obex APIs allow the retrieval of relevant customer information from external sources; such as their investments, social benefits and other pension funds.

Modules

Get up and running quickly with our Obex platform, which is an assortment of API enabled modules. These modules can

be used to build self-service features in apps or on websites. As an advisor, you can use API retrieved data to simulate a multitude of scenarios; offering your customers a chance to experiment and view potential plans without having to commit to them. The modules can be used to construct a complete financial planning platform via the standard UI, or by facilitating you to build your own UI on top of the standard UI.





Endless possibilities

A brief overview of some of the modules the Keylane Obex platform offers:

Projection

Supports all the new prognosis calculation rules applicable to life and pension providers in Denmark.

Optimiser

Finds ways to maximise a family's disposable income, duration of pensions and social benefits by generating a detailed, actionable income plan.

Scenarios

Calculates a family's total income and generates what-if scenarios, such as expected assets and deductions, based on a family's expenses, pensions, savings, etc.

Standard values

Quickly creates a total household budget, or generates a precise credit score. Can be used either as a self-service or as part of a financial planning portal.

Reports

Generates customisable reports, charts and graphs from word documents. These reports can be created - or duplicated - in multiple languages, supporting end-users from various territories.

Key benefits

- ✓ Provides a 360-degree financial overview
- ✓ Allows the advisor and the customer to work together on the same platform
- ✓ Graphical user interface with intuitive navigation
- ✓ Free of portal restrictions; works on all platforms
- ✓ Integrates and uses external and internal data
- ✓ Broad range of API enabled modules

Change has come

Your customers today expect your services to be as intuitive and user-friendly as the plethora of other services vying for their time and attention. At Keylane, we believe tomorrow is today. The future is now, and now is the time to let go of legacy systems and embrace smarter, more cost-effective digital solutions that encourage positive interactions and genuine collaboration between you and your customers.

Curious to know more about Keylane's future-ready software solutions?

We'd love to hear from you! Get in touch and speak to our experts today.

E info@keylane.com

W keylane.com

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www.keylane.com

