



Software for **Financial Services**

NexJ Systems Inc. develops and delivers industry-specific, AI-powered customer relationship management (CRM), customer data analytics and intelligence (CDAi), and customer process management (CPM) solutions tailored for:



Wealth Management
& Private Banking



Corporate &
Commercial Banking



Capital Markets



Insurance

FORRESTER®

"NexJ CRM supports the entire sales cycle out of the box"

CELENT

XCelent Award for Breadth of Functionality in the global financial service

CEB

Best in Class for Workflow Management and Advisor Experience

Customer Relationship Management

NexJ's intelligent Customer Relationship Management differs from other CRM solutions because it integrates any number of disparate data sources into a unified view of all client knowledge and provides best-practice finance-specific CRM functionality versus generic CRM. This functionality is further tailored by line of business (Wealth Management & Private Banking, Corporate & Commercial Banking, and Capital Markets) to drive user adoption and maximize effectiveness.

NexJ's Integrated Desktop, powered by NexJ CRM, provides a single source of all the information and tools advisors, agents, and bankers need to deliver superior customer service, collaborate effectively, improve loyalty, and identify and pursue cross-sell and upsell opportunities.

The NexJ Integrated Desktop enables firms to integrate siloed data stores and applications within a unified user interface and deliver context-aware information to other applications. A flexible portal container combines integrated information with intelligent CRM functionality and presents it to users as a single, seamless application. An Integrated Desktop enables firms to leverage their enterprise data and applications and to help advisors and bankers save time and make more money.

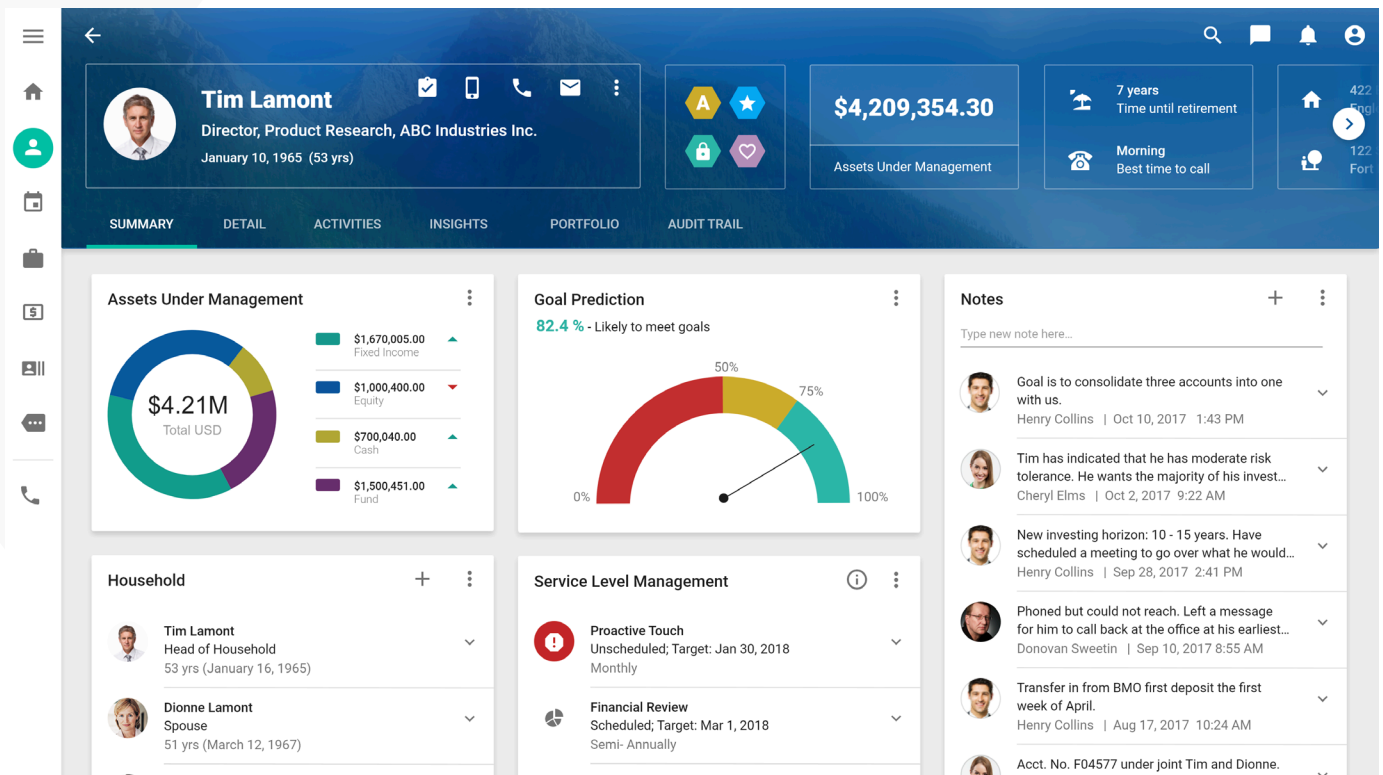
What Our Customers Say:

"Having a product that could be integrated throughout the platform, and not just some stand-alone application that is accessed separately, was key for us."

"I just wanted to tell you how much I love NexJ... NexJ has integrated 14 of our systems into a comprehensive view of the client"

"NexJ will provide the state of the art CRM solution that will provide the sales process discipline and connectivity to I&B ... aligning our business across geographies, products and clients and supporting our client-centric proposition."

"We are very happy and your team has been the best vendor I have ever worked with. On top of this we have already had a successful rollout [less than 3 months]!"



Customer Data Analytics & Intelligence

NexJ Customer Data Analytics & Intelligence (CDAi) is an analytics preprocessor that enables firms to increase the reliability and efficiency of analytics and AI initiatives, even when the data is inconsistent, siloed, unstructured, and changing continually. NexJ CDAi:

- Ingests data from siloed sources, both cloud and on-premise, streaming and at rest
- Resolves data conflicts to create a harmonized view of the client
- Quickly provisions high quality data into analytics and cognitive services
- Exposes intelligence through notifications, dashboards, and insights to improve customer service

NexJ CDAi enables firms to create a single, consistent, and complete view of the client once and use it many times across projects. Because the information models are separated from the technical details of integrating data into the comprehensive client view, firms can quickly and easily reuse existing information models or define new ones for strategic initiatives.

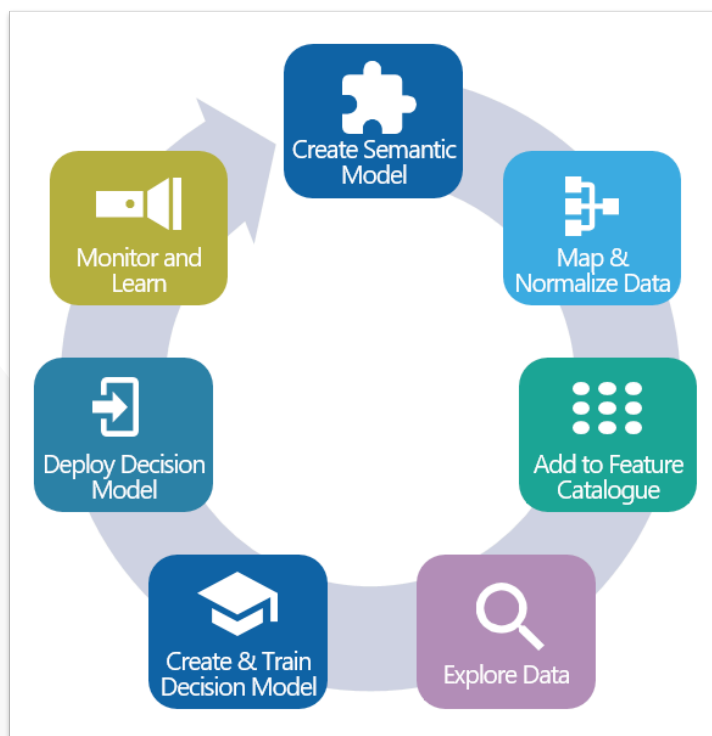
The success of these initiatives rests firmly on NexJ's ability to integrate, with consistent understanding, results from business operations, augmentation or enhancements in performance management with optimized or learned analytics. NexJ's intelligent CDAi will automatically deliver up-to-date, appropriately provisioned client data to the application, channel, or analytics project that needs it. In addition, with NexJ CDAi, firms can continually provide up-to-date data to machine learning to refine processes as new insights are gained from analytics.

Create a single, consistent, and complete view of the client once and use it many times for projects

Quickly and easily reuse existing information models or define new ones for strategic initiatives

Automatically deliver up-to-date, appropriately provisioned client data to the application, channel, or analytics project that needs it

Continually provide current data and analytic insights to machine learning to refine processes and enable a virtuous cycle of improvement



Customer Process Management

NexJ Customer Process Management (CPM) integrates AI-powered business process management (BPM) with intelligent customer relationship management (CRM) tools to enable firms to address key workflows across the entire client lifecycle.

Using NexJ CPM, financial services firms can standardize and streamline client engagement and regulatory processes such as KYC and Portfolio reviews, AML checks, Account Maintenance, and Client Onboarding by leveraging dynamic, branching smart forms, workflow, and approval processes to collect required client data, generate forms, obtain necessary approvals, and prompt users for action. Automated workflows ensure interactions are consistent, efficient, and fruitful for all stakeholders.

NexJ CPM provides automation for all business processes consistently throughout the client lifecycle by leveraging seamless integration to CRM and back-office systems, advanced scheduling and reporting, as well as modular and reusable forms.

Complete Processes Faster

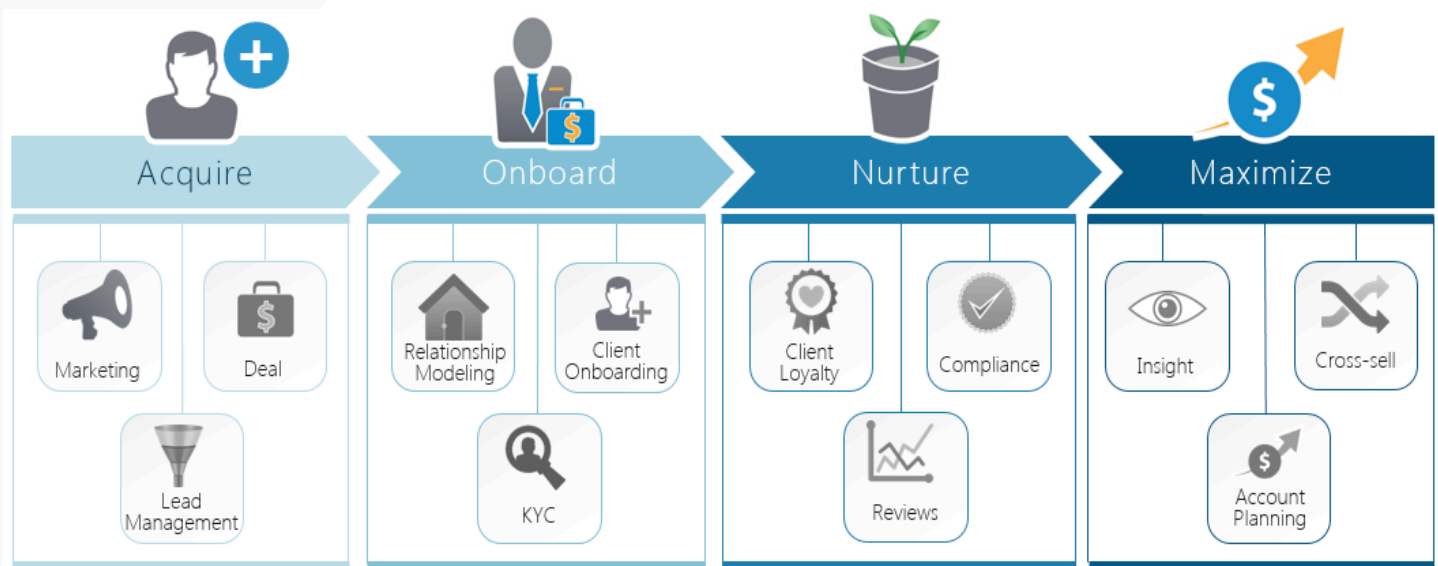
- Streamline client-centric business processes
- Pre-fill forms through integration to CRM and existing systems

Increase Accuracy

- Guide users through data entry with dynamically branching forms
- Speed up approval processes with rule-driven routing and actions

Stay Nimble

- Evolve with changing needs using rapid, run-time configuration
- Enable cross-device, cross-functional workflows to complete steps quickly



To learn more about Software for Financial Services, visit www.nexj.com or email info@nexj.com.



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About NexJ Systems

NexJ Systems is a provider of Intelligent Customer Management software for the financial services industry. The Intelligent Customer Management suite is comprised of NexJ's award winning-products that use artificial intelligence to optimize customer management and increase advisor productivity, and cognitive applications that use machine learning to recommend the right actions to work smarter and faster.

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