



NexJ Solutions for Financial Services

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



"NexJ Contact supports the entire sales cycle out of the box."



XCelent Award for Breadth of Functionality in the global financial services industry.



Best in Class for Workflow Management and Advisor Experience.

Customer Relationship Management

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

NexJ's Integrated Desktop solutions, powered by NexJ's CRM products, provide a single source of all the information and tools advisors, agents and bankers need to deliver superior customer service, collaborate effectively, improve customer 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 best-of-breed 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, agents, 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 customer."

"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 customers 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]!"

The screenshot displays the NexJ CRM interface with the following components:

- Navigation Bar:** Home, Dashboards, Contacts, Schedule, Document Manager, Ad Hoc Reports, Configure.
- Left Panel (Contacts):** Lists contacts like Reynolds, Diane; Reynolds, Joan; Reynolds, Tom (selected); Reynolds, Zak; Rivero, Stacie; Robinson, Rich; Roster, Brian; Russell, Jimmy; Saltarelli, Salvador; Samson, Donna.
- Customer Profile (Mr. Tom Reynolds):**
 - Allen & Company, Managing Director
 - Reynolds Household, Head of Household
 - Client, Tier A, Service Level: Gold, 50 years (Oct 15)
 - Address: 20 Madison Ave, New York, NY 10038 USA
 - Phone: 212-606-4001 x131 (B), 212-556-7878 (H)
 - Email: tom.reynolds73@gmail.com
 - Assets: Total Assets: \$1,837,596.12, Total AUM: \$1,837,596.12, Available Cash: \$245,000.00
- Account Details (Account 8897058651):**

Account Number	Registration	Ownership Type	Primary Owner
8897058651	529	Individual	Reynolds, Tom
9970400793	401 (K)	Individual	Reynolds, Tom
- Holdings Table:**

Currency	Holding Name	Holding Code	Current Value
USD	Acme Packet Inc.	ACME	\$82,128.75
USD	Adobe Systems Inc.	ADBE	\$42,493.85
USD	Apple Inc.	AAPL	\$422,000.00
USD	Coca-Cola Co.	COKE	\$129,496.30
USD	Exxon Mobil	XOM	\$93,732.00
- Stock Chart:** Coca-Cola Bottling Co. Consolidated (COKE) showing 50-day and 200-day moving averages.
- News Article:** "Coke Names New Marketing Chief Amid Struggles - ABC News".
- Conversations Panel:** Shows a message from Henry Collins to Frank Conway regarding a tax amendment dispute.
- Notes Panel:** Contains notes such as "Spoke to Tim suggested we purchased some shares in ibm" and "Tim's daughter, Dee, is engaged. Wedding date is TBA."

Customer Data Management

NexJ Customer Data Management (CDM) is an enterprise integration platform enriched with a semantic model engine.

With NexJ CDM, firms can create a holistic view of the customer across regions, product lines, and channels. Unlike other offerings in the market, NexJ CDM semantically normalizes data to create consistent business meaning across disparate data sources.

NexJ CDM operationalizes information across data silos, including back office systems of record, multiple CRM systems, customer portals, and social media streams. It also acts as a buffer between customer-facing applications and back office systems, enabling firms to rapidly deliver cached information to the people and applications that need it when integrated systems are experiencing slowness and downtime.

Firms use NexJ CDM to power their digital transformation initiatives, enhance customer insights, and support complex and evolving regulatory requirements.

Power Digital Transformation

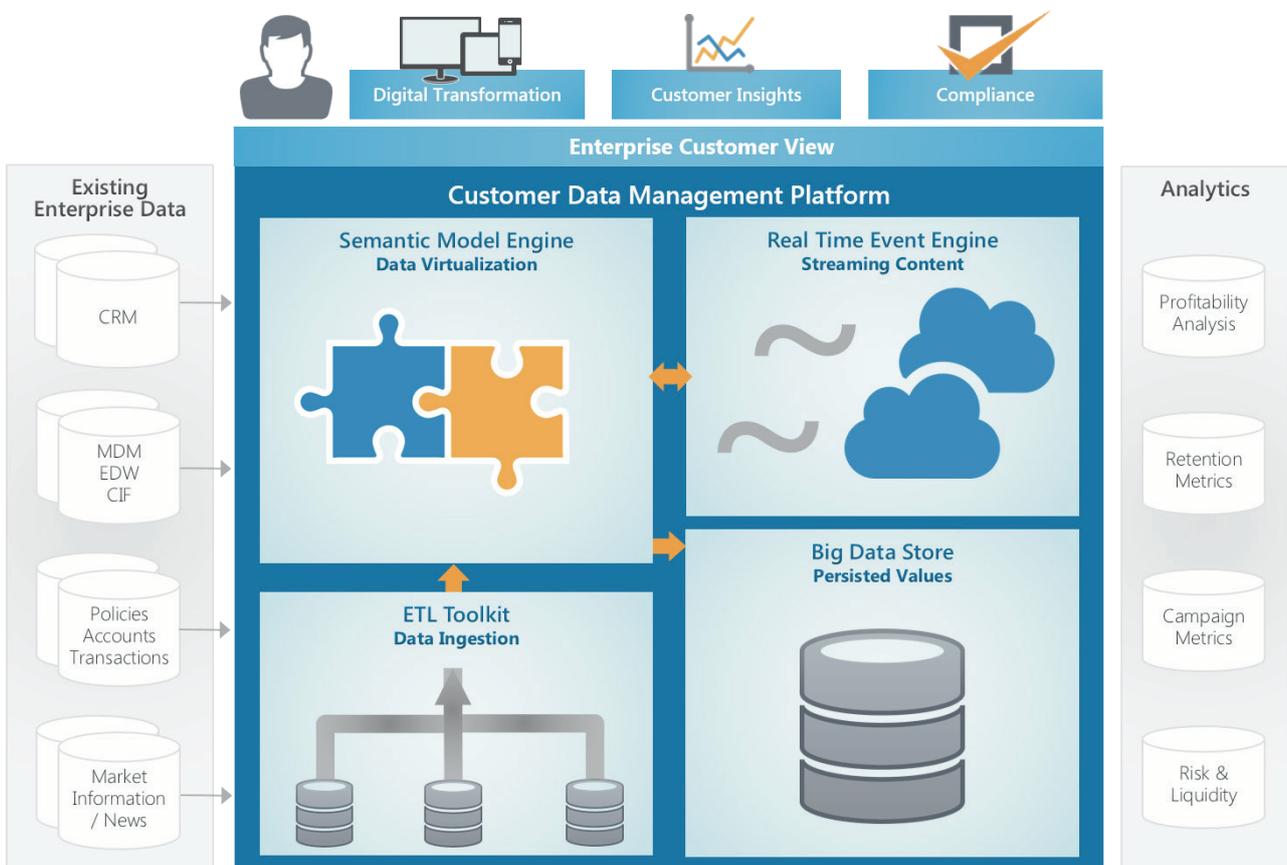
- Provide high-quality data in real-time to the users and applications that need it
- Enable omni-channel, enterprise mobility, and customer experience initiatives

Enhance Customer Insights

- Increase the agility, reliability, and accuracy of analytics projects
- Power real-time analytics for improved engagement and revenue generation

Meet Compliance Requirements

- Track data lineage and history of changes
- Satisfy complex auditing, archiving, and data residency requirements



Customer Process Management

NexJ Customer Process Management (CPM) integrates business process management (BPM) with 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 customer 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 customer data, generate forms, obtain necessary approvals, and prompt users for action. Automated workflows ensure interactions are consistent, efficient, and fruitful for all stakeholders.

NexJ Customer Process Management 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

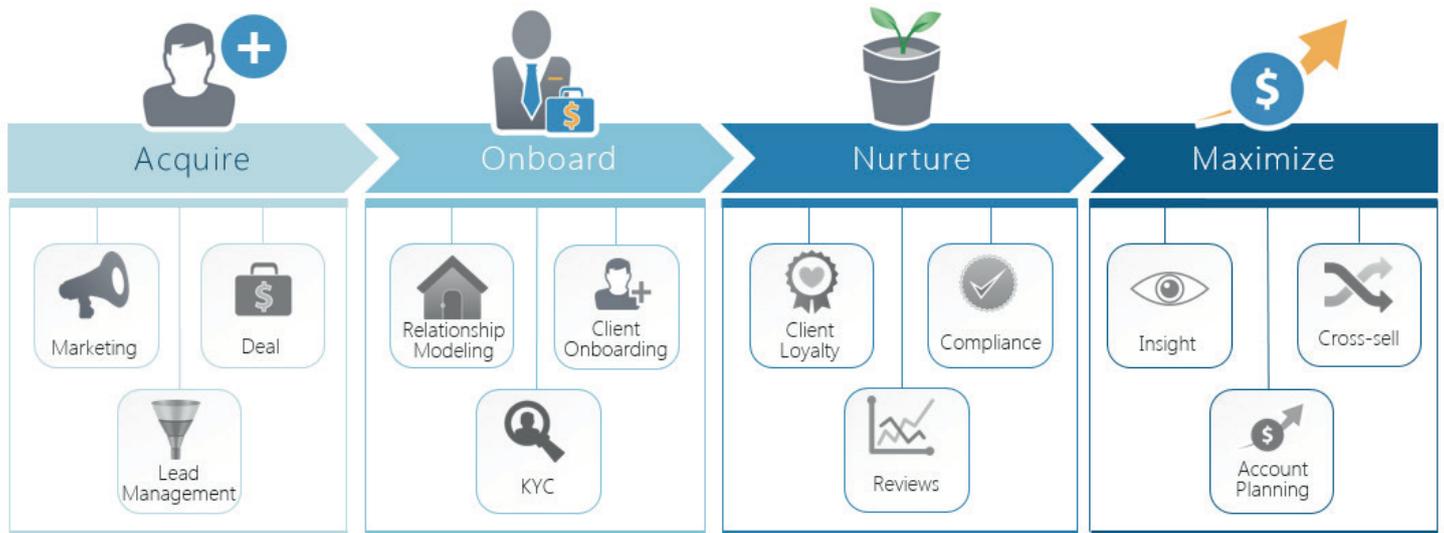
- Streamline client-centric business processes
- Pre-fill forms through integration to CRM and existing systems

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 NexJ's solutions for Financial Services, visit www.nexj.com or email info@nexj.com.



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About NexJ Systems

NexJ (TSX: NXJ) provides enterprise customer management solutions to the financial services and insurance industries. Our solutions, which integrate information from multiple systems into a unified view, include industry-specific customer relationship management (CRM) for multi-channel engagement and collaboration; customer process management for client onboarding and KYC; and customer data management to better understand customers across line of business and regional data silos.

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