



Case Study

Large canadian asset servicing company partners with LTI Canada to streamline transfer agency operations

A leading Canadian asset servicing organization Equipped with more than two decades of industry experience, the company specializes in the investment servicing needs of domestic and foreign institutional investors in Canada.



Business Needs

The Canadian company's requirements were twofold, with an underlying objective of achieving higher business growth:

- ✓ Streamlining two existing legacy platforms into an industry-standard, shared platform.
- ✓ Reducing the complexity of the technology underpinning its Transfer Agency service offering.
- ✓ Additionally, the company wanted to ensure these objectives were fulfilled within a year.

LTI Solution

The Canadian asset servicing company partnered with LTI Canada to transition all of the former's transfer agency clients onto Unitrax®, a unit holder record keeping solution hosted and supported by LTI Canada for the Canadian wealth management industry. Drawing from deep domain expertise and an array of professional services, LTI Canada implemented a feature-rich solution that delivered the desired results within the stipulated time. In addition, LTI Canada also planned and executed concurrent migrations, ultimately transitioning more than 70 clients within a four month period.

Apart from Unitrax®, LTI Canada's solution included the following components:

Wealth Decisions

A customizable, comprehensive reporting and business intelligence application integrated with Unitrax®, enabling data collation from multiple sources

Professional Services

Project management services with a robust framework involving planning, management, reporting, support and teamwork. LTI Canada was instrumental in designing and developing an end-to-end project plan for all client implementations, ensuring complete accountability and transparency.

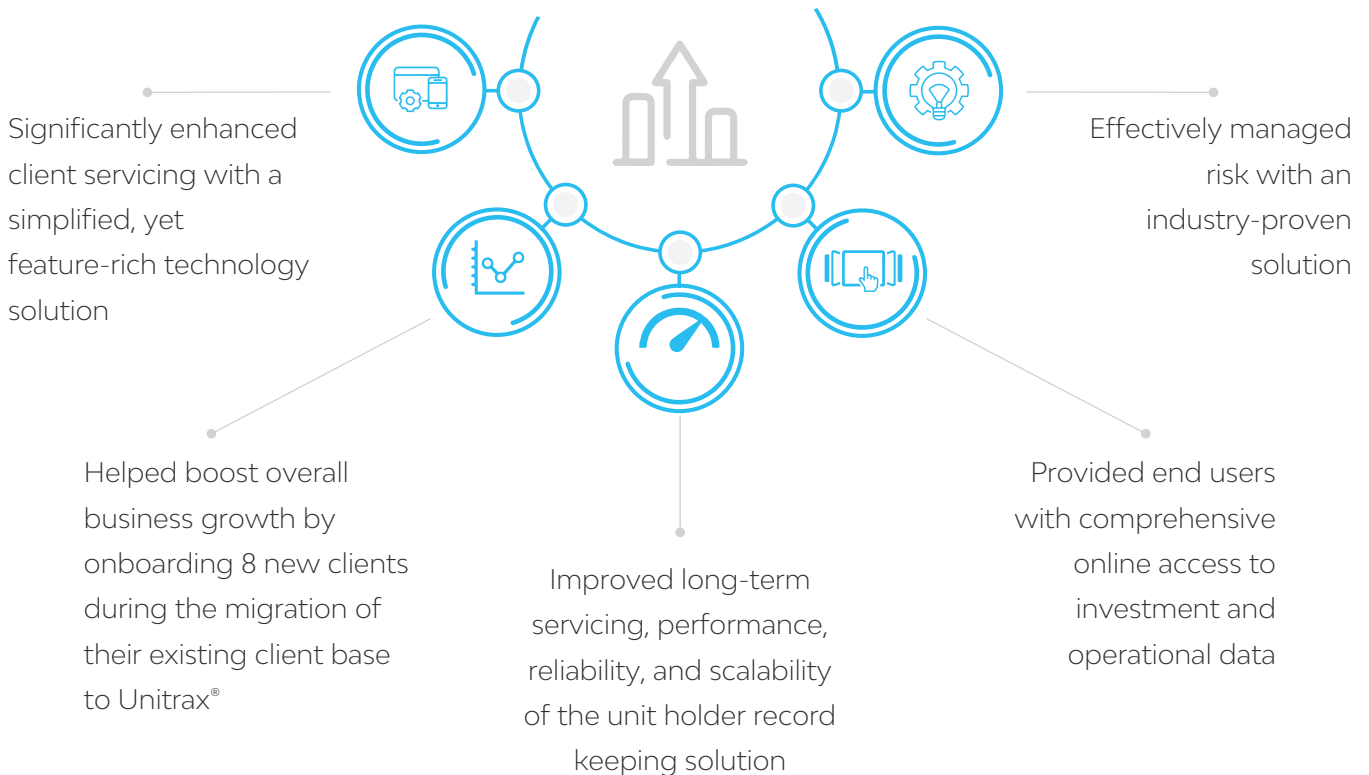
Wealthlink

A self-service web portal for both investors and advisors, comprising versatile eBusiness tools providing real-time, round-the-clock, secure access to investment data.

Business Benefits

The partnership between LTI Canada and the Canadian asset servicing company resulted in the successful implementation of a cost-effective technology solution aligned to industry standards.

The company reaped the following benefits with the solution:



Headquartered in Mississauga, Ontario, Larsen & Toubro Infotech Financial Services Technologies Inc. ("LTI Canada") is a wholly owned subsidiary of Larsen & Toubro Infotech (NSE: LTI, BSE: 540005), a leading global technology consulting and digital solutions company. With over two decades of rich experience, LTI Canada with its flagship product - Unitrax® - a SaaS-based transfer agency record-keeping suite, is one of the leading wealth and asset management platform in Canada, indirectly managing financial assets in excess of CAD \$950Bn, enabling fund manufacturers and insurance providers to address their record-keeping needs across the product spectrum such as Mutual Funds, GICs, Hedge Funds, Alternative Investments, Institutional Funds and Insurance Wealth Products - all under one platform. LTI Canada has a deep understanding of disruptive technologies, and partners with top Canadian financial services firms to accelerate digital journeys of its clients through end-to-end consulting and implementation solutions, Smart Automation and Advanced Data Analytics, Cloud Infra & Security, Assurance Services and Business Process Management. Find out more about us at www.Ltinfotech.com/Canada Email: info.canada@Lntinfotech.com Follow us on Twitter: @LTI_Canada



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