

## News – March 2015

### ■ Bank Julius Baer has introduced integrio for their administration of master and condition data in the area of Inducement Management

Since the end of 2014, Bank Julius Baer has been using integrio, Sowatec's rule-based data governance solution. integrio controls and monitors the entire plausibility check process and the import of the master and condition data delivered by the fund providers. With the implementation of this project, the error rate of the whole process was significantly reduced and human resources could also be saved. Furthermore, with integrio, representing contracts in the systems can be done much more quickly, which leads to better quality data

### ■ calculo for successful implementation of MiFID II provisions

Every financial institution faces significant project and other costs related to the timely and correct implementation of a multitude of regulations. MiFID II is a new set of regulations that has to be implemented soon - by the start of 2016. Under MiFID II, prices, costs and benefits relating to non-independent advisory services need to be disclosed to the customer in much more detail than was previously required. A major financial services company has decided to use Sowatec's calculo - an agile fee management platform - for the implementation of these new transparency provisions. With the Business Rules Management (BRM) technology-based solution, it is possible to give customer reporting precise figures on remunerations and inducements related to specific products/funds.

### ■ Sowatec strengthens local presence in the market area Luxembourg

Sowatec has reinforced its presence in the Luxembourg market with Jürgen Maximini. As a Senior Business Consultant, Mr. Maximini builds on many years of solid experience. We welcome him warmly to the Sowatec team.

### Sowatec News Highlights

■ Parallel to the introduction of a European settlement solution for trailer fees, Allianz Global Investors Europe (AGI) has worked closely with Sowatec in the development and implementation of SCORES, a rule-based sales controlling platform. This success story can be found on [www.sowatec.com](http://www.sowatec.com) under «Client List».

### New employees in the saddle

■ Internally, we are on a roll! Two more positions on the Sowatec tandem have been filled: As a Business Analyst, Nora Bürgin will have the handlebars firmly under control while, as a technical project manager, Timon Weisser will define the right equipment for specific terrain.

