



SUNGARD iWORKS COMPASS

Group and Individual
Insurance, Pension and
Investment Product
Administration

SUNGARD® iWORKS COMPASS

for Pension and Insurance Administration

FOCUS ON EXPERIENCE

SunGard has been providing innovative solutions to the insurance industry for over 35 years. Our staff of experienced professionals includes actuaries, mathematicians and business analysts who make it their business to know your business. Our expertise has taught us the critical role service plays in your success, and because of this, many of the most prestigious names in the industry—both in the U.S. and internationally—have partnered with SunGard. Beyond the United States, we have delivered and implemented systems in Canada, the Caribbean, South Africa, Australia, Great Britain, The Netherlands, Ireland and Namibia, and we have existing clients poised to utilize our software in growth markets such as the Pacific Rim.



GAINING A COMPETITIVE EDGE

Are you seeking to cost-effectively enter new markets?

Are you growing in voluntary benefits?

Are you looking for real-time Internet billing?

The COMPASS Solution—Designed for Growth and Change

iWORKS COMPASS is a participant recordkeeping and plan administration solution for the insurance industry. COMPASS supports a wide range of plan types, including group pension, group life, disability and dental, individual pension and annuity, and corporate profit sharing. COMPASS is used as a single solution to service participants from plan enrollment through payout.

Efficient management and administration of:

- Policy and Workflow
- New Business
- Claims
- Distribution and Servicing
- Accounting and Billing (General Ledger)
- Reinsurance
- Internet Self Service
- Member Record Keeping
- Pension/Annuities
- Client Management
- Individual Insurance
- Group Insurance
- Voluntary Benefits
- Underwriting
- Investment Products

BENEFITS

- Flexibility
- Scalability
- Ease-of-use
- Extend access to third party solutions or customer self-service
- Quickly introduce new and enhanced business processes
- Modular design with “snap together” business components
- Product definition modules provide quick, cost-effective introduction of new products and services

Pension and savings, life, disability, AD&D, dental, vision and group health—from enrollment to termination or claim can be managed with one solution. Plus, the system’s built-in flexibility allows you to quickly construct virtually any type of product and support any line of business within the financial services and insurance industry—key to capitalizing on market trends and opportunities.



MEETING YOUR NEEDS

Performance—Making Technology Work for You

COMPASS is a secure, service-based application that supports multiple currencies and languages. The system may be implemented on virtually any Intel, UNIX or Linux server with a web-based J2EE client interface. Workstations simply require a standard Internet browser and access to the Internet/intranet. All system components are supported by an Oracle data server, providing easy on-line access to all of the information necessary to provide quality service to your clients and improve support for management, administrators, the field force and other interested parties.

Worksite Marketing Support

For support of your worksite marketplace, COMPASS stands alone in delivery of high performance and functionality. The power and flexibility of COMPASS brings self-service to the Web, streamlining the process of enrollment, underwriting, billing and collections. Plus, SunGard has extensive experience in supporting the administration of both investment and risk-based products globally.

Proven Consulting Services

At SunGard, we take a business advisor approach that focuses on assessing customer needs and maximizing the effectiveness of the COMPASS solution. In leveraging our Consulting Services Group, you gain our unique combination of industry knowledge, workplace productivity and software expertise related to COMPASS. Our Consulting Services have been continuously refined and proven with insurance and investment companies throughout the world. We can maximize your resources, shorten your implementation timeframes, and minimize your risk.



At SunGard we understand the dynamic challenges of the insurance and financial services industry. iWORKS COMPASS provides the industrial-strength platform that enables you to efficiently record, manage and process the vast amount of information essential to your business. COMPASS enables you to significantly increase efficiency and customer service with tangible and measurable productivity gains and cost reduction.



ADVANTAGES TO YOU

Commitment to Service

SunGard is recognized for Administration expertise as well as time-tested, proven project management capabilities. We work side-by-side with you in defining your requirements and issues, helping you by delivering and implementing total solutions. Our industry knowledge, workplace productivity, and software expertise will help you maximize your competitive advantage. We provide the expertise necessary to implement COMPASS quickly, cost-effectively and reliably for your organization.

Commitment to Support

We will assign knowledgeable and experienced business, management, and technical professionals to your support team at the start of our partnership. This team is committed to providing premier service throughout the entire implementation process. As you plan future initiatives, we assign the necessary support and development resources to meet your goals.

Commitment to Quality

Experience has taught us that automated regression testing is an essential ingredient of consistent high quality product deliverables and strong user confidence. SunGard applies extensive automated testing programs and procedures to benchmark between your software versions.

Commitment to Value

This is what it is all about—how to reduce your costs and extend your reach. SunGard's cost-effective tools and processes make this a reality. Our pre-built solutions, combined with 35+ years of industry expertise and unsurpassed service ensure the highest value. Whether you are looking for ways to expand into new markets, new distribution channels, or just paying too much today, iWORKS COMPASS is the right solution.

About SunGard iWORKS

SunGard iWORKS is a business-driven IT product family for the insurance industry in each of the following major business lines: life/health/annuities/pensions, property and casualty and reinsurance. iWORKS offers a range of products and services including front-office tools, policy administration, reinsurance, actuarial calculations, financial and investment accounting and reporting. SunGard partners with customers to deliver products and services that align with your changing business and regulatory needs.

About SunGard

With annual revenue of \$4 billion, SunGard is a global leader in software and processing solutions for financial services, higher education and the public sector. SunGard also helps information-dependent enterprises of all types to ensure the continuity of their business. SunGard serves more than 25,000 customers in more than 50 countries, including the world's 50 largest financial services companies. Visit SunGard at www.sungard.com.

www.sungard.com/iWORKScompass

US Toll Free (800) 337-2677

Boston:

313 Speen Street
Natick, MA 01760
Phone (508) 650-6100
Fax (508) 650-6109

Atlanta:

11560 Great Oaks Way, Suite 200
Alpharetta, GA 30022
Phone (770) 587-6800
Fax (770) 587-6808

Miami:

2000 South Dixie Highway
Miami, FL 33133
Phone (305) 646-5300
Fax (305) 646-5426

Denver:

14280 E. Jewell Ave., Suite 200
Aurora, CO 80012
Phone (303) 283-5300
Fax (303) 283-5350

London:

33 St. Mary Axe
London, UK EC3A 8AA
Phone +44 (0) 207 337 6000
Fax +44 (0) 207 337 6010

South Africa:

3 West Street
Houghton, Johannesburg
South Africa
Phone +27 11 483 8400
Fax +27 11 483 0626