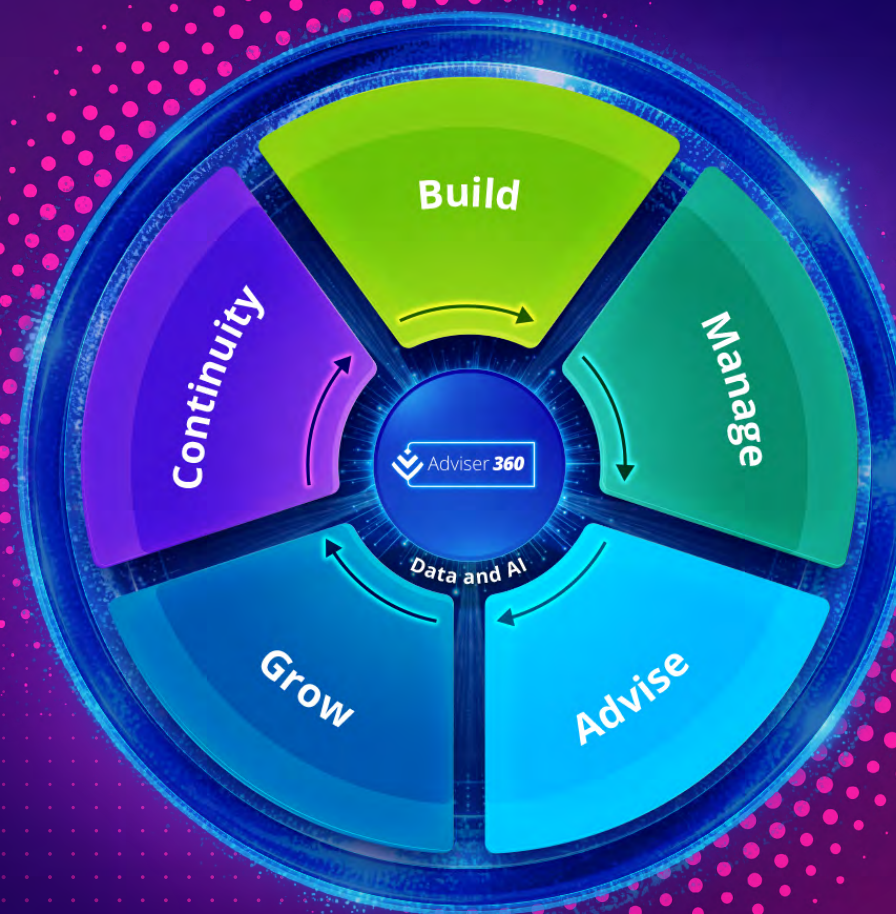




One connected advice journey

At Discovery, we equip financial advisers with cutting-edge digital tools that support every stage of the financial advice journey – from prospecting and onboarding to servicing, growth and succession planning.

Enter →



A connected ecosystem designed to help you scale



Adviser 360 is a single, integrated sales and service platform that connects your data, your clients and your workflow.



This means that instead of switching between systems, chasing information or getting caught up in admin, **you have everything for you and your team in one connected experience.**

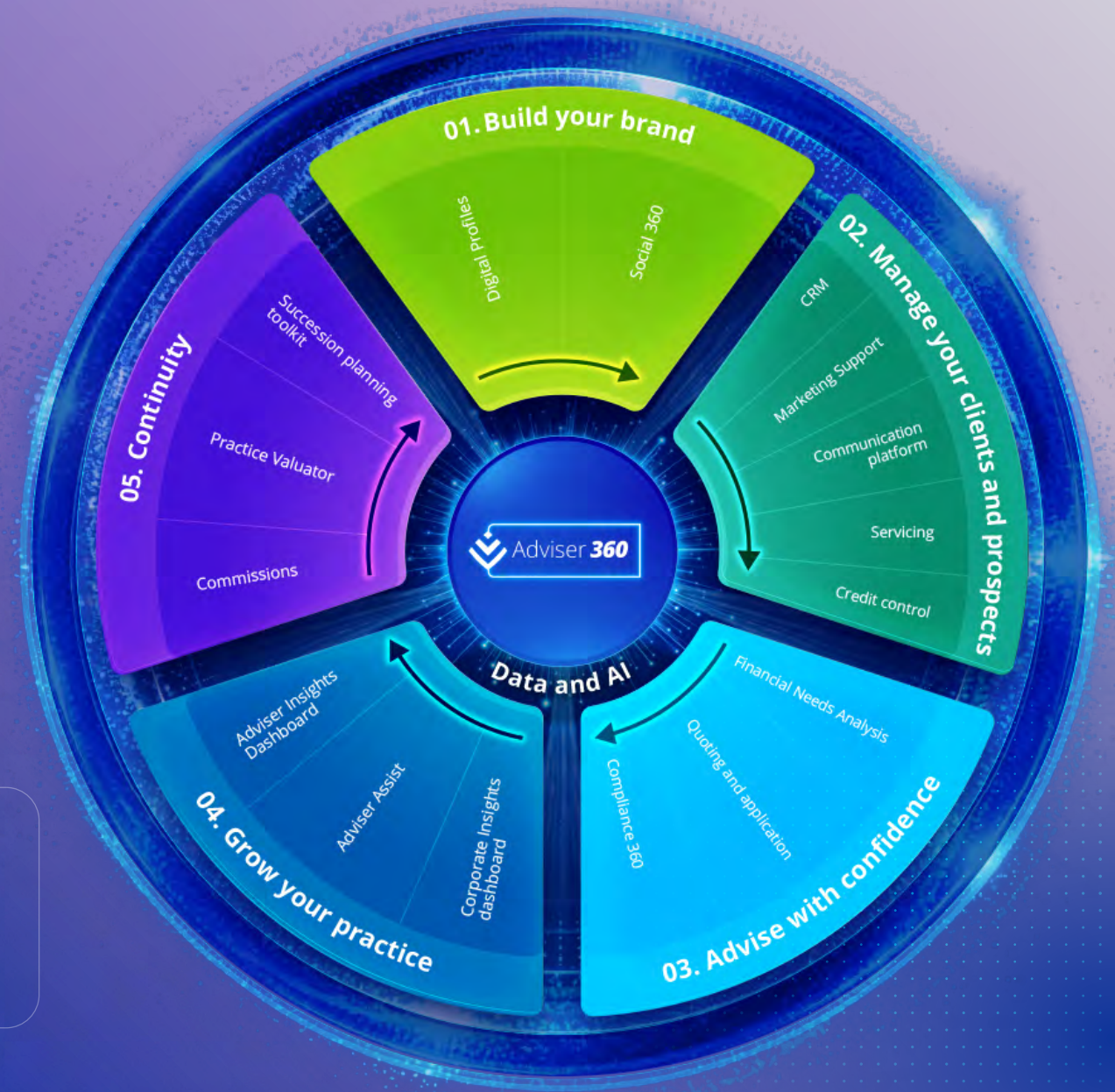


Powered by Discovery's integrated data, insights and digital capabilities, Adviser 360 helps you:

- work more efficiently
- make better-informed decisions
- focus on helping your clients



Adviser 360 simplifies even the most complex processes. What used to take 30-45 minutes can now be completed in just 15 – making life easier for both advisers and clients.



ADVISER 360 BENEFITS

YOUR ADVISER 360 SNAPSHOT

Build your brand

Manage your clients and prospects

Advise with confidence

Grow your practice

Continuity



Your Adviser 360 snapshot

Supports five connected parts of the financial advice journey:



01

Build your brand



02

Manage your clients and prospects



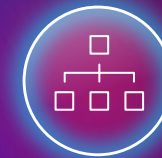
03

Advise with confidence



04

Grow your practice



05

Continuity



ADVISER 360 BENEFITS

YOUR ADVISER 360 SNAPSHOT

Build your brand

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Continuity



01

Build your brand

Create a brand that attracts your ideal clients.



Showcase your unique value and build an online presence through digital profiles and social media.

YOUR ADVISER 360 TOOLS



Make it easier for clients to find and refer you

Digital Profiles: Give clients and prospects one professional place to find your details, connect with you and easily share your profile with others.



Build a social media presence

Social 360: Manage your social presence with pre-approved and compliant content, multi-platform posting and lead tracking to grow your pipeline.



ADVISER 360 BENEFITS

YOUR ADVISER 360 SNAPSHOT

Build your brand

Manage your clients and prospects

Advise with confidence

Grow your practice

Continuity





02 Manage your clients and prospects

Attract, engage and convert
the right clients



Manage your client lifecycle end-to-end from creating prospects to servicing existing clients with embedded CRM and marketing support.

YOUR ADVISER 360 TOOLS



Easier prospect and client management

Client relationship management tool (CRM): One complete client view with the Client 360. One connected relationship platform. Manage, engage and grow every client with confidence.



Engage your base

Communication platform: Engage clients with professional, personalised communication using templates and targeted messaging.



Protect client relationships and retention

Credit control: Monitor outstanding premiums and arrears in one place, making it easier to engage clients proactively and reduce the risk of policy lapses.



Access quick servicing

Manage queries, requests and policy updates, across all products, effectively, with better visibility and control.



Enjoy full marketing support

Launch campaigns and access professional support to drive awareness and generate leads.



ADVISER 360 BENEFITS

YOUR ADVISER 360 SNAPSHOT

Build your brand

Manage your clients and prospects

Advise with confidence

Grow your practice

Continuity



03

Advise with confidence

Deliver advice that is all-inclusive, compliant and personalised, helping you and your clients make smarter decisions



Use integrated data and smart workflows to gain a complete view of your clients, match them to the right solutions at the right time, and streamline quoting, applications and compliance to reduce manual work and turnaround times.

YOUR ADVISER 360 TOOLS



Know exactly what clients need

Financial Needs Analysis: Gain a complete view of each client, align their needs with the right products, leverage pre-populated data to save time, through a streamlined, integrated advice journey.



Submit business faster

Quoting and application: Generate quotes and submit applications across Health, Life, Invest, Insure and Vitality quickly and efficiently.



Get clients onboarded faster

Enhanced onboarding: Confirm client details upfront, preview documents before sending and track progress from start to finish. Clients can securely verify their details, review and accept documents directly through WhatsApp, making the onboarding process quick and seamless in just a few minutes.

Key benefits

- Reduce failed onboarding and follow-ups
- Track progress more easily
- Cut manual admin
- Activate clients faster



Make compliance simpler

Compliance 360: Manage compliance through one consistent Adviser 360 framework across Discovery products, with centralised generation and verification and less manual document handling.

Key benefits

- Smart Compliance: Manage and track all compliance documentation in one secure, transparent environment.
- Follow one consistent compliance process.
- Reduce manual uploads and administration.
- Manage Records of Advice more easily.
- Spend less time on compliance processes.



ADVISER 360 BENEFITS

YOUR ADVISER 360 SNAPSHOT

Build your brand

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Advise with confidence

Grow your practice

Continuity





04

Grow your practice

Turn insights into growth



Identify opportunities earlier, engage clients more proactively and grow your practice with the power of integrated insights.

YOUR ADVISER 360 TOOLS



Get insights to unlock opportunities

Adviser Insights Dashboard:

Identify trends, gaps and opportunities across your client base and action them in an end-to-end marketing to activation journey.



Deepen client relationships

Adviser Assist: Use advanced data insights to understand client behaviour and surface next best actions and recommendations.



Spot qualified Bank opportunities sooner

Bank pre-qualification within Adviser Assist:

See pre-qualified Discovery Bank credit opportunities for eligible clients directly in Adviser Assist, so you know who to contact and what to discuss.

Key benefits

- Focus on clients who already qualify.
- Have more relevant, informed conversations.
- Spend less time pursuing unsuitable opportunities.



Identify corporate opportunities with ease

Corporate Insights Dashboard: See employer and employee opportunities in one place, with insights that help you identify gaps, prioritise conversations and focus on where there's room to grow.

Key benefits

- Spot cross-sell and upsell opportunities.
- Know which clients and actions to prioritise.
- Identify gaps across your corporate portfolio.
- Focus your time on the strongest growth opportunities.



ADVISER 360 BENEFITS

YOUR ADVISER 360 SNAPSHOT

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Continuity



05

Continuity

Protect your legacy.
Plan your future.



Increase the value of your practice

Practice valuator:

Understand the value of your practice and access tailored recommendations to help grow it further.



Plan for the future with confidence

Succession planning toolkit: Plan ahead with confidence through a step-by-step guide to protecting your legacy and transitioning your practice successfully.



Commissions

Gain visibility into your business performance with commission insights that help you understand earnings trends, identify growth opportunities and make data-driven decisions to grow your practice.



ADVISER 360 BENEFITS

YOUR ADVISER 360 SNAPSHOT

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Continuity



Everything you need, all on one platform

Running a successful advice practice means finding opportunities, building stronger client relationships, staying compliant, delivering exceptional service and creating long-term business value.

Let Adviser 360 help make this all a lot easier for you.

For more information to show you how to unlock the best from this tool, visit <https://www.discovery.co.za/portal/intermediary/adviser-360-info-hub> Info Hub or email adviser360support@discovery.co.za.



ADVISER 360 BENEFITS

YOUR ADVISER 360 SNAPSHOT

Build your brand

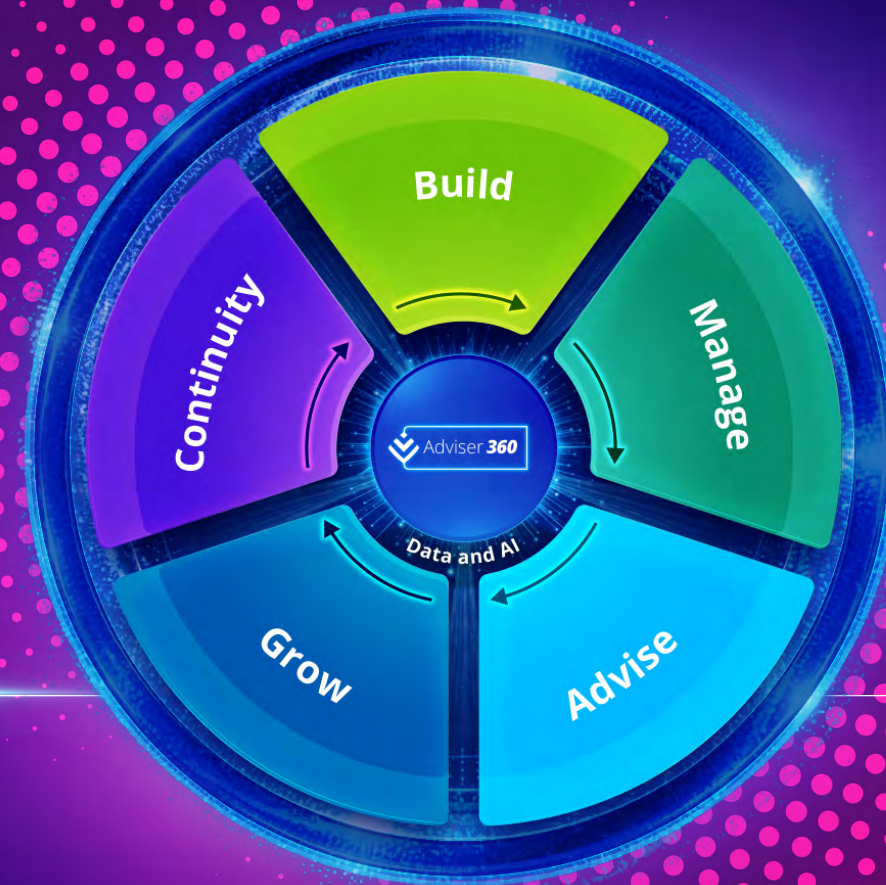
Manage your clients and prospects

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