

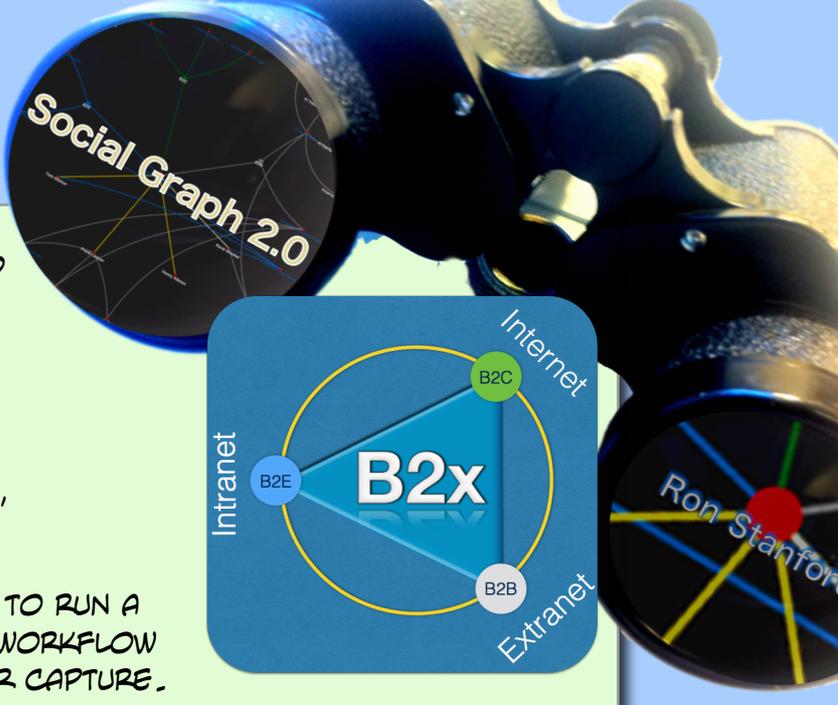
USE CASE

INTERACTIVE INVESTMENT PROCESS

RELATIONSHIP MANAGER STANFORD IS ALERTED BY EVENT NOTIFICATIONS AFFECTING THE PORTFOLIO OF HIS CLIENT PETER SUMMER:

- REDEMPTION OF A BIG BOND POSITION, INTERNAL NOTIFICATION BY B2E PORTAL
- PAYMENT OF AN INHERITANCE SHARE BY PAYMENT PREADVICE OF SUBSIDIARY BANK, NOTIFICATION BY B2B PORTAL

OBJECTIVES: GET ALL RELEVANT INFORMATION TO RUN A SUCCESSFUL INVESTMENT ADVISORY. SHARED WORKFLOW FOR INVESTMENT PROCESS ENDING WITH ORDER CAPTURE.

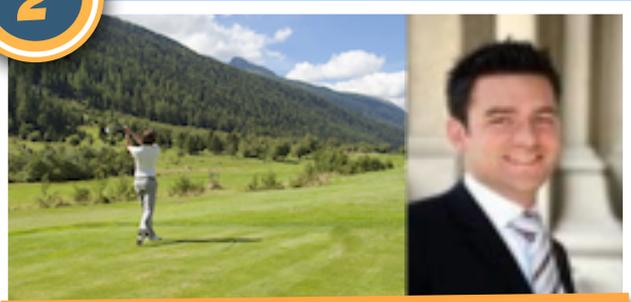


1

RON STANFORD IS REGISTERED AS EMPLOYEE AND RELATIONSHIP MANAGER WITHIN THE ALL IS ONE 2.0 PORTAL. HE HAS ROLES AND NETWORKING PARTNERS IN THE B2E B2C AND B2B PORTALS



2



PETER SUMMER IS RON'S CLIENT AND NETWORKING PARTNER IN THE B2C PORTAL

3

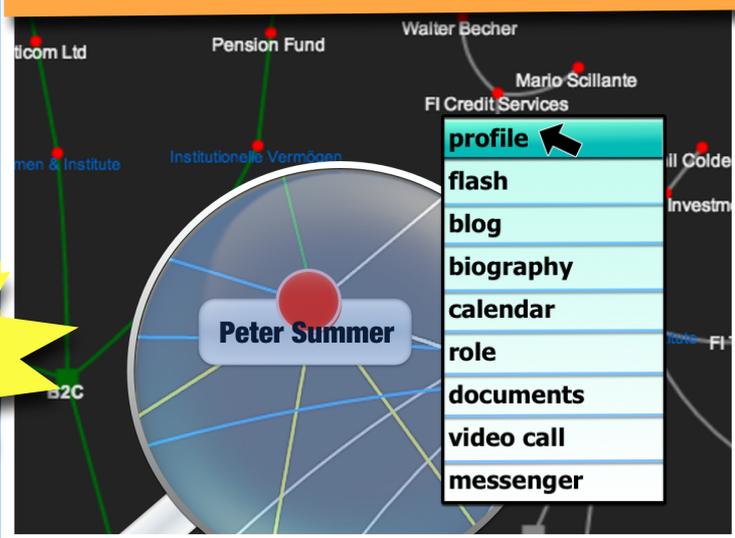
RON RECEIVES NOTIFICATIONS! REDEMPTION OF BOND IS VERY CLOSE (B2E PORTAL) - ALSO THE PAYMENT OF INHERITANCE BY SUBSIDIARY BANK (B2B PORTAL)

4

RON NAVIGATES TO SUMMER'S PROFILE VIA SOCIAL GRAPH 2.0. THE CONTEXT MENU PROVIDES MOST COMMONLY USED FUNCTIONS



TWO EVENT NOTIFICATIONS B2B / B2E



5

THE RESULTS OF A B2E WORKFLOW ANALYSIS ARE AVAILABLE IN SUMMER'S B2C DMS NOW

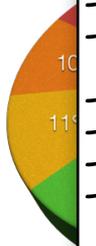
DOCUMENTS

ASSETS/LIABILITIES

RISK ANALYSIS

INVESTMENT OBJECTIVE

FUND FACT SHEETS FROM LEAD OFFERING RESEARCH



Social Graph 2.0 Now available!



ALL WITH SOCIAL GRAPH 2.0!

6

AVAILABILITY CHECK WITH CALENDAR FEATURE - INSTANT ACCESS!



7

...AND 3 PROPOSALS TRANSMITTED RIGHT NOW BY MOBILE MESSENGER

8

MEETING BY VIDEOCALL

PREFERENCES

1. NEW RISK PROFILE

A) I. RISK REACTION ON PROPOSAL (STRESS-TEST)

MEETING DAY!

I would propose the following dates for our online meeting:

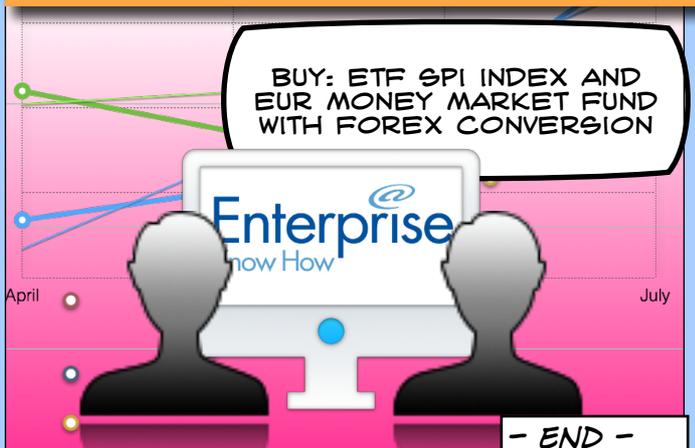
- 1) May 15th 930am
- 2) May 19th, 345pm
- 3) May 24th, 11am

Best regards, Ron Stanford



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ORDERS, FULFILLING ALL SUITABILITY CRITERIAS, WILL BE CAPTURED TOGETHER BY B2C E BANKING



AS A RESULT FROM ANALYSIS AND CLIENT FEEDBACK, A HIGHLY CUSTOMIZED PROPOSAL IS ELABORATED....

- END -