



Dealer Relations

Your proven distribution partner

The investment funds industry relies on the dealer community to sell its products, and success can often depend on the strength of relationships with that distribution channel. For companies trying to build a network, or working to extend their reach, the ability to leverage the expertise and connections of an established dealer relations partner is vital to supporting growth.

Tailored solutions

Unique dealer package program to expand distribution for new product

Targeted campaigns conducted on your behalf

Timely access to regulatory developments in the distribution channel

Valuable ongoing feedback from dealer community

Dedicated focus on distribution

Productive working relationships with the distribution channel are critical to your success, but it can be difficult keeping up with the ever-changing dealer network. The IFDS Dealer Relations program gives you access to feedback we receive from the dealer community. The process of gathering and sharing this timely feedback enhances our products and services, while increasing the dealer's awareness of your product offerings.

Exclusive dealer package program

IFDS has created a unique dealer package program that helps clients establish and expanding their distribution network. With unmatched access to the dealer community, we conduct campaigns to dealers of your choice, distributing prospectuses and fund setup materials to their back offices. We track responses and follow up, allowing you to focus on the manufacturing side of your business. Whether you're a new company or just launching a new product, we know what you need to get your products on dealers' shelves.

Communication and coordination

Our knowledge and solid relationships in the community allow us to facilitate conversation between dealers and clients, especially useful when vetting potential product developments or launches and navigating the fund setup process. We can solicit the advice of the distribution channel and discuss the appetite on the street for a product or feature, resulting in better products and minimizing potential product failures.

Reporting

With an unprecedented increase in new or tightened regulatory requirements in our industry, ensuring that your organization is on top of everything can be a difficult task. Our strong ties with a number of industry associations, leading committees, and working groups enable us to influence initiatives that make it easier for you to do business with the dealer community. A deep understanding of the regulatory environment allows us to drive the change that influences your success.



More reasons to choose IFDS

About Us

With its global headquarters in Toronto, Canada, International Financial Data Services (IFDS) is a world-leading provider of outsourcing and technology solutions to the financial services industry.

IFDS services over 240 financial organizations around the world, providing solutions to a wide range of global asset managers, wealth managers, banks, and insurance companies. With over 1,700 employees and partners located throughout Canada, Europe, and Asia-Pacific, the IFDS enterprise supports more than 18 million accounts with AUA of CDN \$4.9 trillion.

IFDS is a 50/50 joint venture between Boston-based State Street Corporation, one of the world's leading providers of financial services to institutional investors, and Connecticut-based SS&C Technologies, a global provider of investment and financial software-enabled services and software for the global financial services and healthcare industries.

For more information, visit www.ifdsgroup.com.



INTERNATIONAL FINANCIAL
DATA SERVICES

Global perspective - local knowledge

IFDS technology and service solutions are used globally, with operation centres across Canada, Europe, and Asia-Pacific. As a subsidiary of State Street Corporation and SS&C Technologies, we are backed by a multi-billion dollar global enterprise with more than 40 years of experience in financial data processing.

Continuous research and development

Our core software offering, iFast™, is an industry-leading, multi-lingual and multi-currency record-keeping system that provides the technological backbone for some of the most important product innovations in the investment, insurance, and deposit-taking industries. With iFast™, you are supported by technology that is developed within our family of companies.

And because we collaborate closely with the technology teams, you will always be equipped with the ability to meet the needs of a rapidly evolving industry and regulatory environment.

Client-centered service and relationship management

When you choose IFDS, you'll experience our client-centered partnership service model. We create solutions that fit your needs and continuously invest in strengthening our people and technology. Your IFDS team includes a Relationship Manager who develops a deep, strategic understanding of your business and a Client Services support team that works closely with you day in and day out to ensure our partnership is always working in sync.

By the numbers

- ISO 27001 and ISO 22301 certified
- 85,000 calls and 100,000 transactions daily
- \$215 million in client driven projects and \$45 million internal technology investment in the last 10 years
- 99.99% uptime across all environments
- 1700+ staff and vendor partners located in Toronto, Europe and Asia-Pacific
- One quarter of our employees have been with us for over 10 years
- Represented on nine industry groups and associations

For more information please contact:

Philippe Moser
Vice President, Business Change Management & Dealer Relations
International Financial Data Services Ltd.
30 Adelaide Street East, Suite 1
Toronto, ON M5C 3G9

+1 416-506-8169 | pmoser@ifdsgroup.com | www.ifdsgroup.com

International Financial Data Services (Circle and Line Design) is a trade-mark owned by International Financial Data Services and is registered in Canada