

ACCESS CANADA FORMS A STRATEGIC ALLIANCE WITH PERCEPTION WEB DEVELOPMENT



Perception Web Management
Simple.

November 23, 2009, Toronto, Ontario: Access Canada is pleased to announce we have formed a strategic alliance with Perception Web Development. Perception has significant experience in web development for over 50 Credit Unions in Canada. Their existing solutions provide a solid platform for Credit union members to be able

to access and update existing member information and apply for new products. By integrating the web based portal solutions of Perception with the ARMnet CRM-LOS provided by Access Canada, together we can now provide members with a truly integrated solution for managing core member information data (CIF) as well as originating lending products including mortgages, personal loans, lines of credit in a truly seamless manner that insures the members of a Credit Union get the most responsive timelines to their needs in the industry. In interfacing with Perception's web solutions our flexible workflow and seamless integration allows us to present the information provided from the web to the financial advisors in an intuitive manner according to the policies of the Credit Union. Real time integrated management solutions for members.

Since 1996 Perception Interactive Media has been working with Credit Unions and other financial institutions to create effective, intuitive, and user friendly web sites with the unique functionality required for their memberships. In order to ensure that the members enjoy positive user experiences we have developed and incorporated on-line applications, rate sheets, Internet Banking, third party links, and many other on-line tools into the design and functionality of the web sites. Access Canada welcomes the opportunity to work with their team to provide sound end to end solutions for loan products to their Credit Union clients by integrating seamlessly with Perceptions web based solutions. We look to expand this relationship across Canada and provide credible opportunities to Credit Unions to respond to their members needs in a manner previously unheard of in this industry.

Some of the key benefits of the Access Canada ARMnet CRM-LOS when we are configuring the system for a Credit Union to provide these services for member lifecycle management for loans and other products include:

- Standard screens and work flows for managing member life cycle events or LOS requirements have been created but all are configurable to the needs of the Credit Union without ANY hard coded programming.
- Key Lifecycle information on the member type have been clearly defined,
 - This must (and can) be displayed prominently when the member account is opened as it is a driving factor for the advisor in determining their approach to the member.
 - Each contact can result in an update to the member type and it is possible for the member to be different types when dealing with different products.
- Existing "Contact Form" can be managed in ARMnet and used to update member information
 - Data elements which already exist can be populated and pushed to core banking solution
 - Identification of "stale" data elements, those which exists but have not been updated recently to assist advisor in gathering the correct data, asking the right questions
- Consolidated financial picture

- Existing accounts in the core banking system can be listed and detailed in the CRM area of ARMnet
- Existing Mutual Fund account information can be obtained and listed automatically
 - Daily end of day values / balances can be easily imported.
- Existing RESP account(s) and information can be listed from Concentra data monthly imports.
- Assets and Liabilities
 - Enter / re-enter this information
 - Liabilities are available in the credit bureau file
- Present a subset of the total contact information form to the advisor based on
 - Contact type
 - Existing data presence and age
- Provide forms or workflows to gather pertinent information for major life events
 - Marriage
 - Serious illness
 - Divorce
 - Retirement
 - Home purchase
 - Births
- Task management
 - Detailed follow-ups for advisors
 - Ability for supervisors to manage / monitor / audit follow-ups and tasks
 - Reports on contact numbers
 - Report / screen to list / see details of recent updates with respect to one or more contacts.
 - Manual and automatic task creation
 - Birthdays, anniversary, retirement, etc.

Together with Perception Web Development, Axxess Canada is focused on providing sound seamless financial product solutions to Credit Unions across Canada. Should you have any questions with respect to the products or services or desire a demo of the solutions we can provide please do not hesitate to contact either Perception Web Services or Axxess Canada directly at:

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