



GIC Connect

A new capability within Portfolio+

SEAMLESS GIC PROCESSING,
FROM SUBMISSION TO BOOKING.



OVERVIEW

Portfolio+ GIC Connect is a new capability within the Portfolio+ platform that enhances how nominee-name GIC deposit workflows are managed.

It connects submission, validation, processing, and confirmation into a coordinated, real-time workflow—reducing manual effort, improving visibility, and strengthening operational control.

Built for brokered deposit environments, including CANNEX integration, it improves efficiency and accuracy while maintaining auditability, oversight, and reliability in regulated operations.

KEY BENEFITS

- ✓ **Automate deposit processing**
Reduce manual effort across intake, validation, and processing by replacing repetitive file-based tasks with streamlined automated workflows.
- ✓ **Enable Real-Time Execution**
Move beyond batch cycles with near real-time execution, enabling faster turnaround and quicker issue resolution.
- ✓ **Gain Centralized Visibility and Control**
Access a unified view of workflow activity from submission to confirmation, improving oversight and exception tracking.
- ✓ **Scale broker channel activity**
Experience a deeper level of engagement and support.

Modernize GIC Processing

LEGACY GIC PROCESSING

- File-based intake requiring manual intervention
- Batch processing delays execution and visibility
- Limited visibility across the full workflow lifecycle
- High reliance on manual rework & exception management
- Fragmented oversight across multiple systems

PORTFOLIO+ GIC CONNECT

- ✓ Reduce manual intake with **automated processing** via CANNEX
- ✓ **Real-time** or near real-time processing
- ✓ **Centralized, end-to-end visibility**
- ✓ Improve accuracy with structured **validation** and **exception handling**
- ✓ Strengthen operational control with a unified workflow view

Contact our Portfolio+ Sales team to discuss how GIC Connect can modernize your GIC processing operations.

CONTACT US

