



## **Enhanced Fixed-Income Trading on Unified Wealth Platform (UWP) Frequently Asked Questions**

### **Q1: How will this benefit our portfolio managers and operations team?**

A: Managers benefit from real-time access to a deeper trading liquidity pool so they can focus on what is best for the portfolio. Increased liquidity leads to better portfolio management by removing the limitation of what can be traded. The automatic fixed-income security lookup feature saves the time of entering fixed-income securities and new issues manually, expediting the trading process.

### **Q2: Will I have access to Execution Management Systems (EMSs) through UWP?**

A: Yes. The Unified Wealth platform will provide real-time connectivity to leading EMS platforms like TradeWeb™, which will allow you to introduce and trade liquidity for a variety of fixed-income assets. Connectivity to electronic trading and voice trade confirmation platforms certified by Bloomberg, including EMSX, FIT, FXGO, and VCON, is also available.

### **Q3: Are there any additional costs associated with these enhancements as a user of UWP?**

A: The ability to access greater liquidity pools with greater operational efficiency and time savings adds tremendous value and can easily offset the incremental cost. Please speak to your account manager for more details.

### **Q4: What has changed in the way I look-up and upload fixed-income securities and new issues?**

A: The security lookup feature will eliminate the need to upload or add new issues prior to trading them. We have brought UWP into alignment with your front office strategies with this real-time, synchronous feature.

### **Q5: What time and cost savings can I expect as a result of the enhancements?**

A: Time savings of 20%-40% and improvement in operational capacity for portfolio managers and operational staff with ability to easily train new hires. Manual order keying is eliminated, thereby reducing operational risk.

### **Q6: Will the sponsor's security files also be updated, or will we have to wait for the sponsor to update?**

A: Yes. There will be a simultaneous update to all stakeholder views and systems.

### **Q7: How does block trading change with the new enhancements?**

A: These enhancements help the post-trade part of confirmation and make settling of block much more streamlined.

### **Q8: Where can I see a demo of the new enhancements?**

A: A video clip of the enhancements will be made available.

### **Q9: Will any new training be provided?**

A: Yes. Training will be provided.