

Paris, May 2008
Press release

Taitbout group leans on Valdys to automate its internal control

Taitbout group is an administrator of pensions, both savings and health. The group administers around 861,059 contributors and more than 5,598 companies' pensions. The Group Taitbout manages the complementary pension of 1,536,320 employees and pensioners.

To address its regulatory requirements towards the Control authority of insurance and mutual funds (ACAM) and the Solvency II reforms, the group equipped itself with Effisoft's solution, Valdys.

Gerard MERTUK the internal control manager of Taitbout group explains his choice :

"Valdys enabled us to effectively address regulatory requirements, and to structure our internal control approach. This requires an exhaustive knowledge and a total management of the operational risk related to our work. As a genuine decision making tool, Valdys made it easier for us to increase the efficiency and the control of the operations, to update in real-time the process related to the organisational changes, but also to develop an actual risk management policy inside the group".

As a specialist in the internal control and the risk management, Effisoft has partnered with Taitbout group since 2007 in the implementation of a solution enabling them to unify the internal control process and perform better risk mapping related to their activities (clients, financials, images, legal...). Effisoft's Valdys product was selected for its structured approach and adaptability to Taitbout group requirements. Its competitive price and its intuitive and very operational approach also factored strongly in its selection.

In order to conform to the recent requirements of the ACAM (permanent internal controls, risk mapping, etc...) as well as anticipate the regulatory requirements to come (Solvency II), Taitbout group decided to rethink its risk policy, and to formalize the operational process. The objective is to optimize the group's internal controls mechanism. As a strategic initiative driven both by the internal control requirements as well as the overall operations, this project leans heavily on a software dedicated to this challenge and able to support a tailored configuration. In fact, beyond the software integration to Information System a great deal of work has been done to better define and integrate the risks and their interdependencies between different branches and functional management of the group.

Valdys solution is then selected for its structuring approach and adapted to Taitbout group expectative. Its competitive financial positioning and its intuitive and very operational approach represented very determining elements of selection.

By undertaking such a project, the goal was to raise awareness to the partners, and involve them in the setting up of an efficient risk control policy. They will be able to optimize their performance by limiting risk associated to their areas of responsibility. More than that, Valdys enables them to access to predefined alerts and to quickly take corrective measures.

Thanks to the implementation of this project, the Group optimized its quality and formalized its various risks into a unique environment (through the creation of risk tree structure realized in common with experts of diverse departments). On the operational level, the different partners and employees can access their data through the intuitive interface. This dimension is an important element of productivity as it provides everyone a unified approach to managing risk.

Finally, a progressive skills transfer by the Effisoft team enable Taitbout group to quickly become autonomous and get the maximum benefits of the functionalities provided by Valdys. Leaning on Valdys, the group became able to improve its governance, to give more visibility to its board of directors, to optimize its operational process and position itself to conform with future regulatory requirements. While today the focus of the project is on pension activity, in the future, it will expand to include provident activity and social action.

About Effisoft :

Effisoft is an international group providing software for professionals of insurance, reinsurance and risk management for 15 years. Effisoft touches a clientele of more than 200 companies worldwide thanks to its geographical settings (Paris, London and Boston). Effisoft counts among its customers one insurer out of 2, numerous small and medium sized businesses and the major actors of the CAC40, the FTSE and the NYSE.

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Le Groupe TAITBOUT s'appuie sur Valdys pour modéliser son contrôle interne

Le Groupe TAITBOUT est un acteur de référence dans les domaines de la retraite, la prévoyance, l'épargne et la santé. Il compte 881 680* cotisants et justifie de 97 679* entreprises adhérentes en retraite et 5 876* en prévoyance. Au total, le Groupe TAITBOUT gère la retraite complémentaire de 1 570 795* salariés et retraités.

Dans le cadre de ses obligations réglementaires tant vis-à-vis des Fédérations AGIRC-ARRCO que de l'Autorité de Contrôle des Assurances et des Mutuelles (ACAM) mais également dans la perspective de la réforme solvabilité II, le Groupe s'est doté de la solution Valdys édité par Efficsoft.

Le Directeur du Contrôle Interne et de l'Audit du Groupe TAITBOUT, Gérard MERTUE, explique son choix :

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