Fact Sheet

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Dashboard Enhancement to Unified Wealth Platform

One Window Into the Advisor's World

When the many applications that financial planners, advisors and other front-office associates use in the course of a day are separated, time that could be utilized servicing and engaging customers instead is spent toggling between systems. In response, Fiserv has created advisor dashboard technology that brings all these capabilities together in a single portal.

Engage Fiserv today for advisor dashboard technology on Unified Wealth Platform.

Comprehensive Advisor Technology

Fiserv delivers a new advisor dashboard technology for a comprehensive, customer-centric view of front-, middle- and back-office information. This information is integrated with best-of-breed Fiserv and partner solutions with access to managed-account data from Unified Wealth Platform from Fiserv, the industry's largest, most stable and scalable managed account platform.

Data passes seamlessly through a flexible portal container regardless of context and is presented to users as a single application. With these capabilities, users can access data and tools to efficiently onboard new clients and service their existing book of business, leaving them more time to grow assets.

Features for Advisor Efficiency

- Single access point to integrated planning, proposal, trading, reporting and portfolio accounting tools
- Role-based dashboard/landing page with configurable widgets
- Integration with other Fiserv and third-party applications (workflow, document management, e-signature, customer relationship management [CRM], home office systems)
- Streamlined, paperless onboarding and service workflows (planning, proposal and new account forms)
- Responsive user interface design for use on PCs and tablets

Fiserv is driving innovation in Payments, Processing Services, Risk & Compliance, Customer & Channel Management and Insights & Optimization. Our solutions help clients deliver financial services at the speed of life to enhance the way people live and work today. Visit fiserv.com and fiserv.com/speed to learn more.

A More Integrated Unified Wealth Platform

This dashboard is part of Unified Wealth Platform. With the initial version, financial advisors can access account opening, proposal generation, manager analysis, marketing material, client account data, and account maintenance features. They can also access portfolio management and trading tools of Unified Wealth Platform for rep-driven programs and review investment performance and fees. This open architecture solution enables client firms to include additional Fiserv capabilities, such as goals-based financial planning, along with external solutions such as CRM tools and proprietary solutions.

Connect With Us

For more information about Unified Wealth Platform, call 800-872-7882, email getsolutions@fiserv.com or visit us at www.fiserv.com.

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