

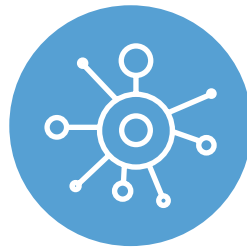
Financial Advice Management from Fiserv

Spend more time advising clients and less time in cumbersome systems

Addressing Your Business Priorities



Support advisor growth



Accelerate digitization



Deepen client relationships



Increase operational efficiency



Drive revenue and growth

Your Solution – Delivered by Fiserv

With integrated financial planning technology from Fiserv, it's never been easier for advisors to collaborate with clients to identify financial goals, create investment proposals, open new accounts and deliver financial advice across multiple clients and households. Whether you require a specific solution such as goals-based planning, proposal generation or an end-to-end technology platform, we can integrate your choice and mix of solutions so they perform as one streamlined ecosystem.

Efficient

Scalable

Flexible

Collaborative

Technology Solutions for Wealth Management

Drive growth and efficiency to stay in step with the way people live and work today.

fiserv.

Empower advisors to deepen and grow their book of business with a streamlined financial planning experience



Financial Planning

Utilize a best-in-class suite of goals-based and comprehensive financial planning technology through one streamlined system instead of multiple planning products



Advisor Dashboard

Provide snapshot of advisor's book of business with access to managed product research, proposal generation and workflow integration to optimize client onboarding and servicing



Investment Proposals

Generate well-designed, client-facing proposals quickly and easily with integrated technology that scales across multiple advisors and accounts



Scenario Manager

Create multiple "what-if?" scenarios, allow for contingencies and alternative funding strategies, and illustrate the impact of plan variants and decisions in real time with clients



Configurable Risk Assessment

Provides each organization with the opportunity to create its own risk assessment methodology to help tailor advice and promote specific portfolios



Product Solutions

Demonstrate the need for products such as long-term care insurance, life insurance, fixed and/or variable annuities and simulate how they can improve a client's financial outlook and protect against risk



New Account Opening

Open new accounts quickly and seamlessly with proposal-generation integration, custodian-specific workflow, and vendor-agnostic electronic signature capability



APIs

Leverage all functionality and calculations of our financial planning technology with complete control over the user experience. Deliver a digital experience customized to your own brand and vision on any digital device, website or app

Connect With Us

For more information about financial planning, call 800-872-7882, email getsolutions@fiserv.com or visit us at www.fiserv.com/financialplanning

