Services

Wealth Operations Automation

Automated Wealth Management to Strengthen Client Retention and Compliance

Competition for high net worth clients is fierce among U.S. financial institutions. Wealth Operations Automation from Fiserv can help you retain and grow this client segment by offering integrated wealth management services that simplify processing and improve client service.

While institutions look to grow and maintain valuable market share by attracting high net worth clients, they must also focus on keeping operational costs under control. They must also maintain compliance with the ever-changing and complex regulatory requirements affecting wealth management, trust and private investment firms.

To remain successful, your firm must keep a laser focus on the delivery of responsive and personalized attention to your high net worth clients. Because of disparate legacy systems, many institutions do not have instant access to the client documents, information and transaction requests they need to quickly and accurately respond to client needs.

Today's wealth firms need a wealth operations automation solution that fully connects sales, front-office operations, back-office operations, risk management and client services processes with core accounting and CRM functions to ensure client satisfaction and regulatory compliance.

Automated Wealth Management to Meet Today's Challenges

With Wealth Operations Automation, Fiserv helps your firm improve client satisfaction by managing all document-based functions for account opening, maintenance and transaction processing – including purchases, deposits and asset transfers.

By automating internal operational and sales processes, wealth management, trust companies and private investment firms can improve client service, on-board clients faster, accelerate transaction processing, and improve both management oversight and compliance capabilities. The result is improved acquisition and retention of high net worth clients, as well as better operational efficiency with reduced costs.

Partner with Fiserv

Serving the technology needs of the financial service industry for more than 25 years, Fiserv helps clients maximize efficiency and solve business challenges in all areas of wealth management. We can help you optimize your operations and grow profitability by meeting the needs of high net worth clients.

Connect With Us

For more information about Wealth Operations Automation, call 800-872-7882, email replyecm@fiserv.com or visit www.fiserv.com.

Key Benefits

- Quick identification of priority requests to adjust workloads for quicker, more tailored client response
- Instant access to the complete client case files across the enterprise (including sales and client service). This will enable strategic sales and support, resulting in additional product sales based on a client's existing portfolio
- Flexibility to adapt operational processes to remain aligned with changing regulatory requirements (such as Dodd-Frank, KYC and others)
- Improved operational efficiencies resulting in significantly improved handoff times between processors and reduced transaction processing cycle times

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.

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