

Product



AllData® PFM

Account Aggregation That Enables Powerful Personal Finance



For many consumers, their finances are part of a highly complex ecosystem spread across multiple financial institutions. With AllData PFM from Fiserv, you provide your customers with a comprehensive overview of their position across multiple institutions to analyze spending, review investments and take control of their financial lives – all while growing your relationship.

All in One Place

With access to more than 18,000 unique data sources, including banking, credit, investment and insurance, AllData PFM aggregates account data from virtually any online source. Once added into the system, AllData PFM provides an interactive view of an individual's complete financial picture through powerful tools that take the guesswork out of money management.

With automatic categorization that pairs insights from historical spending patterns with actionable next steps, AllData PFM simplifies managing everyday expenses. Consumers can monitor current activity while analyzing transaction histories across accounts to set budgets, establish savings goals and track progress.

All With Our Expertise

According to industry analysts, consumers who use online banking for personal financial management are four times more likely to increase their use of bill payments and two times more likely to increase the number of other banking transactions. Other similar solution offerings require you to send the customer to an entirely separate site, which can detract from the user experience. AllData PFM integrates with your existing online banking site and scales to support a growing base. You can choose the specific features you want to incorporate by embedding AllData PFM widgets into your online banking solution with minimal development effort.

With AllData PFM, your consumers can see all of their finances – safely and securely – across multiple financial institutions and within the context of your online banking experience. AllData PFM leverages the same technology used to safeguard many internet banking and investment portals. Information such as usernames, passwords, and account and transaction data is protected using multilayered security that includes multifactor authentication and powerful data encryption.



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 to learn more.

All the Best Features

- Budget Wizard – Enables users to create a budget within minutes
- Customized Spending Alerts – Notifies users when they are approaching their spending limit for a particular category
- Financial Dashboard – Provide a consolidated view of online account balances across financial institutions, as well as snapshots of the current month's cash flow, top expenses, budgets and goal status
- Transaction Management – Transactions are automatically categorized based on user preferences and built-in rules
- Budget and Goal Tracking – Monthly budgets and goals are automatically tracked against user-defined targets
- Reporting and Analysis – Charts, graphs and advanced search capabilities are available for those who want to create filtered reports for simplified and targeted transaction monitoring, or analyze their spending habits to set better budgets and goals

Key Benefits

- Builds relationships by making your institution the hub of your customers' financial lives
- Provides access to more than 18,000 unique data sources, including banking, credit, investment and insurance
- Gives you the information you need to identify trends and uncover new opportunities to build revenue
- Makes better use of the your existing online customer portal

Connect With Us

For more information on AllData PFM, call 800-872-7882, email getsolutions@fiserv.com or visit fiserv.com.



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