Build and Grow Relationships With Goals-Based Financial Planning

Consumers want help with their retirement plans. They aren’t confident in the advice they receive and they worry about the future – especially when it comes to how much they’re saving. They need a plan they can trust.

Information is needed

Less than half of consumers feel informed when it comes to saving for retirement.

The opportunity is there

72% of consumers don’t currently have a financial advisor.

Many consumers want a plan

Of those saving for retirement, only 25% feel confident they’re saving enough.

Having a financial advisor – and a plan – increases confidence and satisfaction

81% of those with a financial advisor say they’re confident at the advice they receive.

87% say they follow their plan strictly.

76% of investors who are provided with a plan purchase insurance or investment products.

74% are satisfied with their financial advisors.

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Fiserv technology can help advisors deliver greater value to clients

A complete picture

Straightforward illustrations clarify financial situations and show how assets and insurance options offer protection.

A look at “what if”

Scenario management helps identify the best solution in real-time collaboration with clients.

Powerful visualization

Easy-to-read charts and graphs make client conversations and decision-making more productive.

Sophisticated analysis

Advanced calculations help estimate probability of success toward goals.

Financial & Retirement Planning solutions from Fiserv enable advisors to deepen client relationships and provide robust solutions to help clients plan for retirement.

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