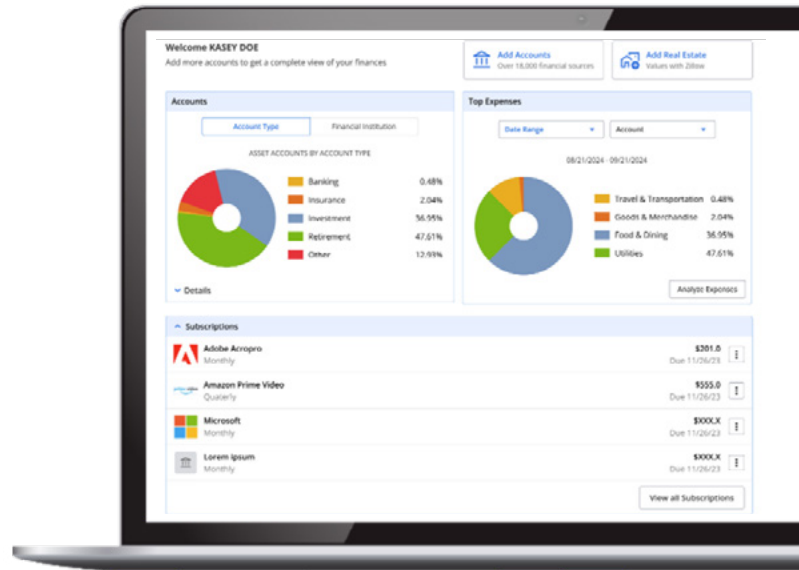


AllData[®] PFM

Become the financial hub
customers rely on

Today’s consumers manage increasingly complex financial lives spread across multiple institutions, accounts and tools. AllData PFM brings everything together – giving customers a clear, consolidated view of their full financial picture while keeping your institution at the center of their daily financial decisions.



A complete financial picture – in one place

Seamlessly embedded into the digital banking experience, AllData PFM brings together spending, cash flow, goals and investments in one intuitive dashboard. Powered by secure aggregation from more than 18,000 data sources, it delivers a comprehensive, real-time view across banking, credit, loans, investments and insurance accounts – giving customers instant visibility into balances, transactions, budgets, net worth, subscriptions and trends so they can make confident, informed financial decisions while strengthening long-term engagement.

Designed to drive engagement and trust

AllData PFM is fully integrated within your existing digital banking environment – eliminating the need for customers to leave your platform or rely on third-party budgeting apps. By keeping financial data, credentials and insights under your control, AllData PFM reinforces your role as the primary provider, increases digital “stickiness” and creates opportunities to identify trends, personalize experiences and deepen relationships – without added complexity or development effort.

AllData PFM by the numbers

18,000+

unique data sources

11M+

active users

98%+

overall connection success rate

Coverage across

96%

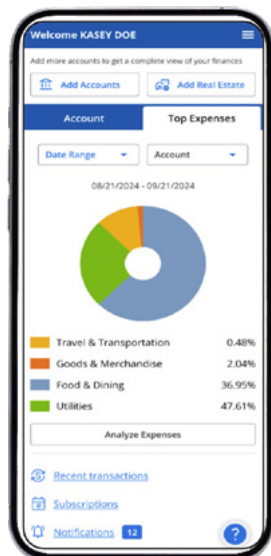
of U.S. DDAs

Key product features

- **Intelligent dashboard** – A consolidated view of balances, net worth, cash flow, top expenses, goals and alerts – positioning your institution as the customer’s financial hub
- **Budgeting and spending insights** – One-step budget creation with automated categorization and visual spend analysis to support financial wellness and ongoing engagement
- **Transaction and cash flow analysis** – Searchable transaction history and trend visuals that improve understanding and trust in the digital experience
- **Subscription management** – Identifies recurring subscriptions with vendor, amount, frequency and next payment date to help customers control discretionary spending
- **Alerts and proactive notifications** – Balance, spend and transfer alerts that drive timely engagement and support deposit and product usage
- **Goals and investment tracking** – Savings goals and consolidated views of investments and assets to support long-term financial planning
- **Account aggregation and insights** – External account aggregation that enables personalized insights, targeted offers and a complete financial picture

Modern UI with full mobile alignment

AllData PFM delivers consistent, fully accessible experience across desktop and mobile. The modern UI features improved navigation, ADA compliance and expanded branding and customization – ensuring customers enjoy the same powerful functionality wherever they bank.




Key benefits for banks and credit unions


- Reinforces your institution as the trusted financial hub for your customers
- Keeps customer data, credentials, and insights securely under your control
- Increases engagement by reducing reliance on third-party financial apps
- Delivers insight into the full financial picture of each household
- Identifies trends and opportunities to drive personalization and growth
- Seamlessly integrates into your existing digital banking experience




Connect with us

For more information
about AllData PFM:

 800-872-7882

 getsolutions@fiserv.com

 fiserv.com

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](https://www.fiserv.com)** to learn more.