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## **NBT Bank's Wealth Management Division Turns to Tablets to Facilitate Client Engagement through Sales Enablement from Fiserv**

- | NBT Bank's Wealth Advisors and Retirement Plan Specialists will use Sales Enablement to streamline and personalize sales engagements, as well as simplify the customer setup and onboarding process
- | New tool will allow advisors to concentrate more on the client and less on paperwork
- | Fiserv solutions and expertise help clients deliver financial services at the speed of life, meeting customers where they are using the technologies they prefer

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv, Inc.](#) (NASDAQ: FISV), a leading global provider of financial services technology solutions, announced today that NBT Bank, headquartered in Norwich, New York, has selected Sales Enablement from Fiserv. Sales Enablement is an interactive, fully customizable brand and sales message-focused mobile tool designed to facilitate a more personal, dynamic conversation with clients and prospects. NBT Bank plans to utilize the solution to support its Wealth Management Division and will arm both its Wealth Advisors and Retirement Plan Specialists with this new, tablet-based sales solution.

NBT Bank has an aggressive digital banking strategy in place with a focus on building strong customer relationships and giving customers all the options they need to take control of their financial lives. With Sales Enablement, NBT Bank's Wealth Management Division will customize content and workflows on an Apple iPad<sup>®</sup> to streamline and personalize sales engagements, as well as simplify the customer setup and onboarding process.

"Our role as a trusted consultant and advisor is the basis for all of our activity and serves as the foundation for our technology strategy. In particular, we believe it is part of our social mission to help our constituents build effective retirement plans, as well as meet other short and long-term financial planning goals," said Tim Brenner, President of Wealth Management for NBT Bank. "By utilizing Sales Enablement from Fiserv, we will be able to facilitate constructive and relevant conversations with our clients, delivering the best financial advice to support their personal objectives. The process for the client will be modern, focused, and easy-to-follow, allowing our advisors to concentrate more on the needs of the client and less on paperwork."

NBT Bank Chief Information Officer Joe Stagliano, added, "We have an organization-wide commitment to continuously improving the client's digital experience. This partnership with Fiserv highlights that direction."

Sales Enablement eliminates most paper and disparate tools by combining email, documents, collateral, agreements, video, and ROI and pricing calculators into a single mobile solution that is connected to the financial institution's existing sales management, onboarding and core account processing systems. Utilizing optimized visual design on the tablet, marketing collateral and communications catch customer's attention more than paper or traditional digital presentations and brochures.

"People don't want a complicated and lengthy paper-based retirement planning experience; they want a digital experience that integrates their work, home and financial lives. While some banks are just talking about it, NBT Bank is walking the walk when it comes to implementing a digital-based banking experience that helps customers realize their investment goals," said Brian Jorgenson, senior vice president, Financial and Risk Management Solutions, Fiserv. "Sales Enablement brings the bank a whole new way to facilitate essential personalized interactions, meeting its customers and prospects where they are."

In a world that is moving faster than ever before, Fiserv helps clients deliver solutions that are in step with the way people live and work today - financial services at the speed of life. Learn more at [TheSpeedofLife.com](#).

### **Additional Resources:**

- | Sales Enablement from Fiserv - <http://fisv.co/1PCcFU5>

## About NBT Bank

NBT Bank offers personal banking, asset management and business services through a network of over 155 locations in six states, including New York, Pennsylvania, Vermont, Massachusetts, New Hampshire and Maine. NBT Bank and its parent company, NBT Bancorp, are headquartered in Norwich, N.Y. NBT Bancorp had assets of \$8.2 billion as of September 30, 2015, and is traded on the NASDAQ Global Select Market under the symbol NBTB. More information about NBT Bank and NBT Bancorp can be found online at [www.nbtbank.com](http://www.nbtbank.com) and [www.nbtbancorp.com](http://www.nbtbancorp.com).

## About Fiserv

Fiserv, Inc. (NASDAQ: FISV) enables clients to achieve best-in-class results by driving quality and innovation in payments, processing services, risk and compliance, customer and channel management, and business insights and optimization. For more than 30 years, Fiserv has been a leader in financial services technology, and today is among FORTUNE<sup>®</sup> magazine's World's Most Admired Companies and Forbes magazine's America's Best Employers. For more information, visit [www.fiserv.com](http://www.fiserv.com).

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