



Fiserv Enhances the Financial Planning Experience for Advisors and the Home Office

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New financial planning technology enables advisors to work more efficiently and collaborate with clients to build stronger relationships

BROOKFIELD, Wis.--(BUSINESS WIRE)--Oct. 17, 2018-- [Fiserv, Inc.](#) (NASDAQ: FISV), a leading global provider of financial services technology solutions, is enabling financial advisors to operate more efficiently and better collaborate with clients to identify and achieve their investment goals. The company's new offering includes a flexible and interactive financial planning tool that integrates with home office systems, streamlining manual processes so advisors can spend more time focusing on clients.

Financial planning technologies often lack integration to other systems, which means advisors must extract and cull data from inside and outside their organization to create a complete picture of their clients' financial standing. Manually pulling data from internal and external systems is a challenge faced by more than 60 percent of advisors, according to the [U.S. Advisor Metrics 2017: The Next Generation of Planning](#) report from Cerulli Associates, a global research and consulting firm that follows asset management trends.

The financial planning technology from Fiserv bridges this gap, allowing advisors to seamlessly initiate financial plans, generate proposals, and easily open and monitor accounts without having to toggle between systems or re-enter data for service requests or trading. Investment proposals can be quickly generated and accounts can be opened and electronically signed--either remotely or in the office. Advisors can discuss plans and illustrate changes with clients in real-time, enabling them to immediately see the impact and adjust plans accordingly.

"Consumers today are looking for help managing their finances, and advisors expect interactive and easy-to-use tools that allow them to attract clients and better manage their book of business," said Cheryl Nash, president, Investment Services, Fiserv. "We're committed to providing firms and advisors with technology that empowers them to focus on building relationships and helping clients reach their financial goals."

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 [fiserv.com](#).

Additional Resources

- Wealth Management from Fiserv - <http://fisv.co/2l95J9W>
- Financial Advice Management - <https://www.fiserv.com/industries/wealth-management-solutions/financial-advice-management.aspx>
- Unified Wealth Platform - <http://fisv.co/2e7TrH2>

About Fiserv

Fiserv, Inc. (NASDAQ: FISV) enables clients worldwide to create and deliver financial services experiences in step with the way people live and work today. For more than 30 years, Fiserv has been a trusted leader in financial services technology, helping clients achieve best-in-class results by driving quality and innovation in payments, processing services, risk and compliance, customer and channel management, and insights and optimization. Fiserv is a member of the FORTUNE® 500 and has been named among the FORTUNE Magazine World's Most Admired Companies® for five consecutive years, recognized for strength of business model and innovation leadership. Visit [fiserv.com](#) and [follow on social media](#) for more information and the latest company news.

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