5 Advantages of Financial Advice Management from Fiserv

1 **Automated Goal Strategies** – Address client goals quickly and easily using automated strategies and plans. Tailor plans as needed with configurable assumptions and limits. Establish trust to fuel the relationship for deeper conversations down the road.

2 **Automated Resource Allocator** – Automatically allocate resources towards set goal(s) in addition to manual controls. Spend more time focusing directly on clients and ensure resources are in sync with goals.

3 **Progressive Rebalancing** – Employ sophisticated rebalancing strategies to support client goals. Optimize the glide path and suggested portfolio with greater flexibility and consideration to the client's specific goals, life stage and risk over time. Don't just limit yourself to arbitrary, system-driven dates that many other financial planning tools control.

4 **Progressive Tax Rate** – Taxes can be calculated based on the average/effective tax rate or using a 1040-level progressive tax rate. Calculations can be done on both current and future tax analysis.

5 **Product Solutions** – Demonstrate the need for products such as long-term care insurance, life insurance, fixed and/or variable annuities and simulate how they can improve a client's financial outlook and protect against risk.

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For more information about our financial planning solution, call 800-872-7882, email getsolutions@fiserv.com or visit us at www.fiserv.com/financialplanning

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