

**11 November 2013**

## **Fiducian Systems Support FOFA Compliance**

**Fiducian Portfolio Services Limited (ASX: FPS)**, has developed the ideal financial planning software solution that enables speedy compilation of a Fee Disclosure Statement. While many struggle with Fee Disclosure Statements, an important element of compliance with FOFA, Fiducian's latest updates to its financial planning software FORCe are making it easier for Financial Planners.

Financial Planners using FORCe receive data directly from their adviser payments system and link them to their client accounts on FORCe financial planning software. This data is regularly refreshed so a Planner can generate a Fee Disclosure Statement over any period and have it automatically formatted by date, amount and fee type along with GST, directly into the Disclosure Statement template.

"The Fee Disclosure Statement should not be a document that creates confusion or fear, instead it should promote the value adding service that Financial Planners provide" said Head of Fiducian Financial Planning, Robby Southall. "So we are quite happy with this functionality which our IT team have delivered to bring our Planners closer to their clients and generate efficiencies".

Fiducian Head of Information Technology Alan Dunne, said "Financial Planners have already received positive feedback from clients, so I'm pleased we were able to leverage off FOFA requirements to give Planners something that actively and positively promotes their business to clients. It's a win win!"

Ends.

### **About FORCe**

FORCe is the proprietary comprehensive financial planning software developed by Fiducian for Financial Planners.

### **About Fiducian**

The Fiducian Group is a specialist financial services organisation established in 1996. Fiducian provides financial services through five key areas: funds management, portfolio administration, information technology, financial planning and accounting/accountancy resourcing.

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