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MEDIA RELEASE

Fiducian rolls out upgrade to FORCe financial planning software

SYDNEY Friday 11 March 2016 – Fiducian is rolling out a significant enhancement to its financial planning software, FORCe Desktop, to integrate with the Fiducian platform.

The latest phase of integration enables financial planners to implement switch orders directly from FORCe after reviewing and modelling clients' portfolio changes.

Fiducian Chief Information Officer Alan Dunne says: 'Orders will flow through Fiducian Online and the Fiducian platform to ensure recommendations can be implemented almost immediately after being authorised by the financial planner.'

'Planners can track changes on Fiducian Online as well as view any confirmation correspondence sent to clients. Clients' portfolios are updated within FORCe as orders are completed.'

FORCe Desktop is now undergoing a new development phase where integration with Fiducian's other advice solutions will be the key, says Dunne.

The integration with Fiducian Online as well as the Fiducian platform ensures that the planning network has a holistic solution to meet clients' needs.

The next phase planned will deliver platform client correspondence directly to electronic client files within FORCe. This will also be a huge benefit for the efficiency and productivity of the planner's business and move ever closer to a paperless work environment.

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