



Planners help platform innovation at Fiducian

Monday 15 August 2016 SYDNEY – Meeting client needs through technology innovation is the driving force behind the Platform User Group (PUG) at Fiducian Group Ltd.

Luke Grbin, Head of Platform Services, says five highly experienced planners with a combined 80 years of experience lead Fiducian's unique PUG approach. 'Planners are at the frontline every day,' Grbin says. 'They know what clients need and so they tell us what will ensure best-service and compliance.'

'It's not us sitting in headquarters, handing down orders – this is completely hands-on and real-world.'

He adds that these planners have experience in numerous platforms, including Fiducian.

For example, the Platform Users Group helps drive completely automated straight-through processing (STP) to ensure client instructions are executed in the shortest possible time with no re-keying or errors.

Grbin describes the process as having four steps:

1. client instructions are modelled in FORCE
2. these are 'pushed' to Fiducian Online for authorisation
3. instructions go straight to FasTrack for external execution (through the custodian, broker or bank)
4. confirmation is received in FasTrack, feeds to Online and then on to FORCE.

Grbin says PUG's input improves both the superannuation services and the Investor Directed Portfolio Services (IDPS). 'Planners are in the trenches so they're the ones who are best-placed to tell us exactly what's needed to deliver the best-possible service on-time, every time.'

Contact

Luke Grbin 02 8298 4648 lukegrbin@fiducian.com.au
Philippa Yelland 02 8298 4681 pyelland@fiducian.com.au

About Fiducian Group Ltd (ASX:FID)

Publicly listed Fiducian Group Ltd is a successful end-to-end financial services company in this fiercely competitive sector in Australia. FGL is 100% Australian-owned and operated.

Fiducian provides:

1. platforms for investment and superannuation
2. funds management and investment
3. financial planning and wealth management
4. technology solutions for financial planners and their clients
5. accounting/resourcing and SMSF administration

Through the vision of founding managing director Indy Singh, the company listed in 2000 as Fiducian Portfolio Services Ltd. After re-structuring in early 2015, the company is now listed as Fiducian Group Ltd. Funds under Management, Administration & Advice (FUMAA) total to \$4.7 billion.