



Fiducian delivers unique online software for planners

Thursday 26 November 2015 – Fiducian continues to invest in unique software development to support financial planners Australia-wide in delivering fast, secure online integrated services.

Chief Information Officer Alan Dunne says that the latest enhancements to Fiducian Online are part of the strategy for the listed company (ASX:FID).

‘The latest enhancements are possible through Fiducian’s strategy to invest in a new platform administration system, new online services and our financial planning software,’ he says.

‘Together, these support financial planners all around the country with a complete platform for advice, implementation and ongoing servicing of their clients.’

New online features for clients and planners on the Fiducian platform expand the planner’s dashboard for more visibility over client accounts. ‘This enables planners to track progress of transactions such as investment switch instructions,’ says Dunne.

Other enhancements include address and contact changes to instantly update client details and correspondence available online.

Dunne says that more new features will roll out continuously in the next few months to streamline the administrative burden for advisers and their assistants.

Fiducian’s Head of Platform Services, Luke Grbin, says Fiducian platform and online design are driven by advisers through the Platform User Group.

Another benefit of the new online system is that planners will have even more functionality in Fiducian’s unique strategy of seamless connections between planning and platform.

‘For planners using Fiducian’s FORCE financial planning system, integration with Fiducian Online and the Fiducian platform will enable them to seamlessly maintain client accounts directly from their software,’ says Grbin. ‘Planners not using FORCE still get to take advantage of Online’s ease-of-use tailored reporting and transacting capabilities.’

Philippa Yelland

Head of Marketing & Communications

pyelland@fiducian.com.au

02 8298 4621

0407 089 825



FIDUCIAN
INTEGRITY • TRUST • EXPERTISE

MEDIA RELEASE