FINASTRA

THE FUTURE OF FINANCE IS OPEN

GETTING PERSONAL WITH A PFM

PFMs are a useful tool for community banks and credit unions to gain a wholistic view to their account holders as well as target educational and cross promotional solutions through engaging applications.

WHAT IS A PFM?

Personal Financial Manager (PFM): Suite of digital tools that allows your account holders to better understand their spending habits and ultimately improve their financial lives.

8/10

of consumers are more likely to do business with a company if it offers a personalized experience

LEARN MORE

WHAT DOES A PFM DO?

- GOAL TRACKING
- TRANSACTION CATEGORIZATION
- SPENDING ANALYSIS
- ACCOUNT AGGREGATION
- ACTIVITY ALERTS

> "Over 1/2 of consumers look towards their primary financial institution as a trusted source of education and financial literacy."

WHY SHOULD A COMMUNITY FINANCIAL INSTITUTION USE A PFM?

DATA
Gain insights to how your users bank, like external accounts and goals

TARGET
Use data to provide specialized offers and services

ENGAGEMENT
PFM users are 4x more active

COMPETE AND WIN
Against larger, more well-funded financial institutions through a third-party integration

EDUCATE
Teach users how to budget, make smarter money decisions