

13-14 MARCH 2017
ABU DHABI
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EXHIBITION CENTRE
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MEFTECH **LIVE DEMOS**



PERSONAL FINANCIAL MANAGEMENT (PFM)



INNOVATOR: ALBERT MORALES, STRANDS

finance.strands.com

PROBLEM ADDRESSED BY THIS INNOVATION:

Helping people make better financial decisions

KEY BENEFITS:

- More than 150 FIs have implemented our solution including Top tier 1 banks like Barclays, BBVA, BMO, Deutsche Bank, PostFinance
- Multi-device
- Modular
- Customizable

PREVIOUS AND EXISTING CUSTOMERS:

Barclays, BBVA, BMO, Deutsche Bank, Post Finance, BAC, AIB, ING, UBI Banca, Hello Bank, BNP Paribas, Fiducia and many more.

INNOVATION DESCRIPTION:



Our module-based PFM allows financial institutions to assemble their own PFM solution.

- Choose the functionalities that best fit customer needs from the PFM module catalogue
- To facilitate its integration within online banking each module can be reduced to a mini-module
- End-users can personalize their PFM from this widget library

Tools:

Income and spending analysis
Financial calendar
Cash-flow analysis
Spending plan & safe to spend
Budgeting
Saving goals
Community comparison
Transaction details

HOW DOES THIS INNOVATION ADD VALUE?



Strands Personal Financial Management (PFM) is an award-winning application that drives financial engagement between account holders and financial institutions. PFM makes financial planning more fun and convenient. Categorization, budgeting and analysis are among the many features that can be easily integrated within the existing digital banking system.