

Nautilus® Efficiency Manager: Deposit Accounts

Strengthen Compliance, Mitigate Risk, Reduce Costs and Improve Customer Satisfaction From a Single Intuitive Platform

Opening or completing maintenance on depository accounts is often time consuming, costly and problematic due to regulatory requirements. These challenges lead to abandoned relationships, poor customer service, slowed deposit growth, frustrated staff and increased compliance risk for your financial institution.



Automation with Nautilus Efficiency Manager: Deposit Accounts from Fiserv can address these challenges and provide an immediate return on investment.

Manage the Process Strategically

Deposit Accounts streamlines, standardizes and helps automate opening or completing maintenance on depository accounts in accordance with mandated regulatory guidelines. The full-featured solution leverages case management to provide operational efficiency, enhanced task and document management, easy yet comprehensive auditability, and a material return on investment.

With Deposit Accounts, you get:

- Centralized auditing of account opening and maintenance requests, inclusive of required supporting documentation
- Automated verification with account/maintenance data from your core banking system
- Preconfigured dashboards and workflows based on user role

- Predefined audit and approval rules, hierarchy and actions, with ability to request assistance or escalate (if needed)
- Automated email notifications for missing documentation, account/maintenance status and more
- Integration with Fiserv core banking systems
- Easily reconfigurable business rules and processes
- Integrated document management to keep all your documents in one place
- Reporting and full audit of all activity

Feature and Functionality Rich

Deposit Accounts delivers comprehensive and user-friendly functionality needed to audit account opening and maintenance requests accurately and quickly.

- Centralized storage, supporting enterprise access of all account opening/maintenance documentation, inclusive of records management
- Supports multichannel documentation receipt, via paper, fax, email or online
- Automated work identification, categorization and prioritization



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- Management and compliance reports, detailing account-opening and maintenance requests processed, timeframes and exceptions
- Automated generation of documentation requests and account/maintenance status
- Configurable to your institution, process and compliance guidelines
- Multiuser and department functionality

Key Benefits

- Reduce operating costs associated with manual, checklist-based audits for regulations such as Know Your Customer (KYC) and Customer Identification Program (CIP)
- Improve customer service through branded, automated status notifications
- Mitigate risk by creating defined, consistent, automated and transparent account opening and maintenance request processes
- Enhance branch, deposit operations and audit staff satisfaction through reduction of manual tasks, standardized processes, systemic work distribution and automated escalation
- Facilitate business and depository growth by reducing customer disengagement due to slow, friction-filled account-opening processes

Connect With Us

For more information about Nautilus Efficiency Manager: Deposit Accounts, call us at 800-872-7882, email replyECM@fiserv.com or visit www.fiserv.com.



Fiserv, Inc.
255 Fiserv Drive
Brookfield, WI 53045

800-872-7882
262-879-5322
getsolutions@fiserv.com
www.fiserv.com