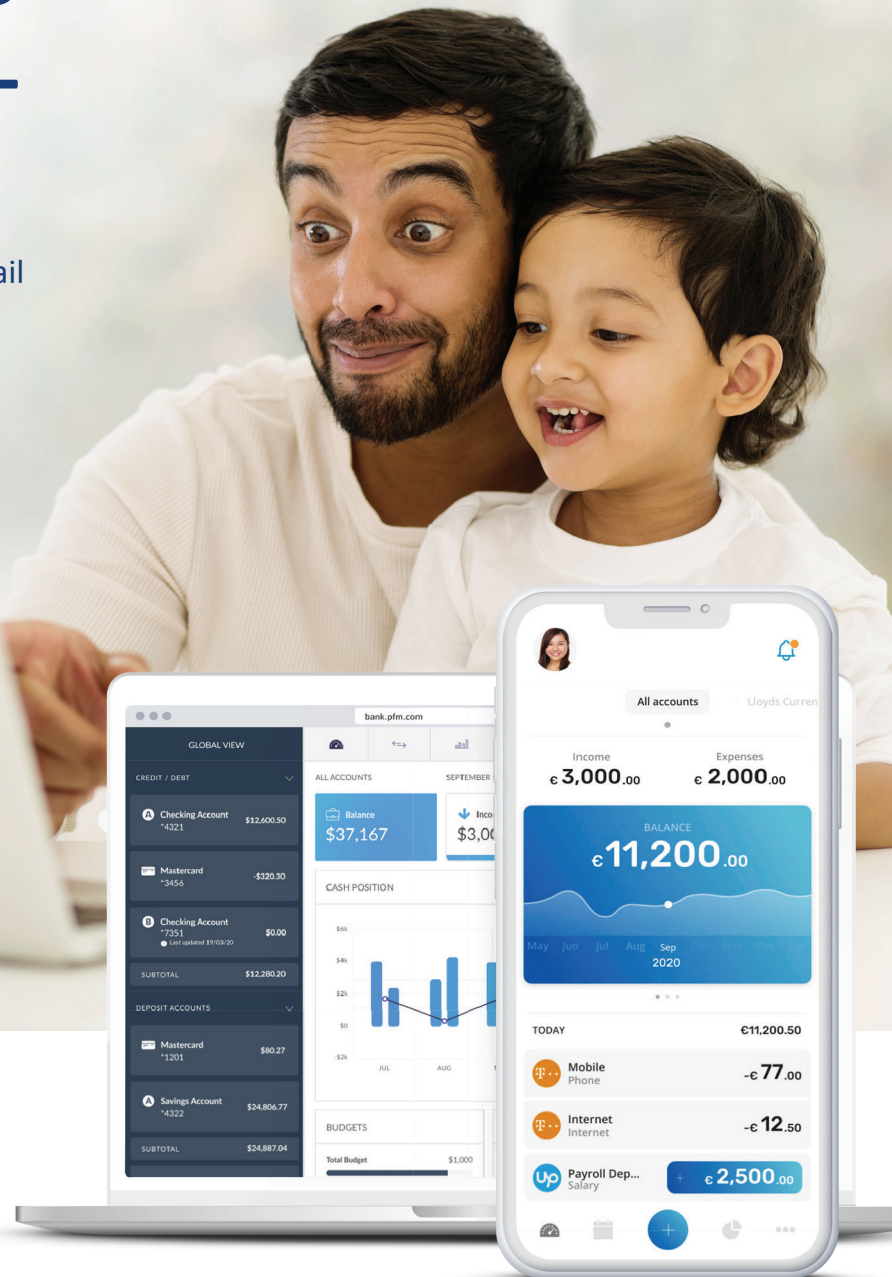


HELP CUSTOMERS REACH FINANCIAL WELLNESS

Financial control and foresight are integral parts of the CRIF PFM solution, helping retail customers achieve financial wellness and increase their value by offering relevant insights for better financial management.



REVOLUTIONIZE YOUR CUSTOMER EXPERIENCE



Provide effective financial wellness program

Deliver clear financial information to your customers so they can better understand their cash flow.



Stress-free planning

Keep your customers' expenses under control with enriched transaction viewing and analysis tools.



Help accomplish goals with personalised advice

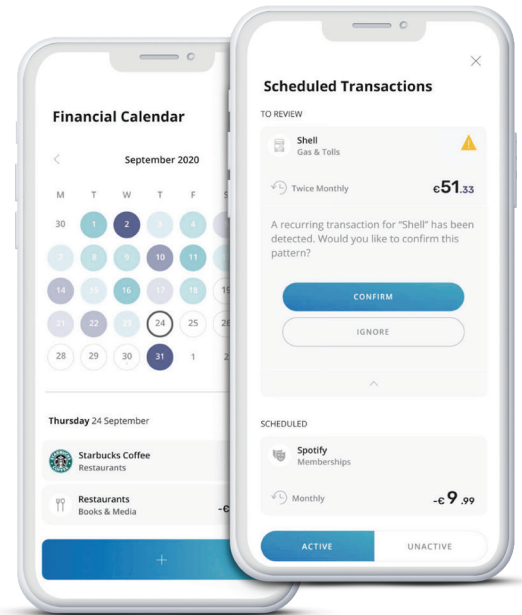
Leverage personalised, data-driven customer insights to provide a superior customer experience.

HOW IT HELPS YOUR CUSTOMERS

1. TRACK Personalised customer experience

Updates with real-time information about all their accounts and personalised data-led insights and notifications. Pattern detection enables them to track and review recurring payments.

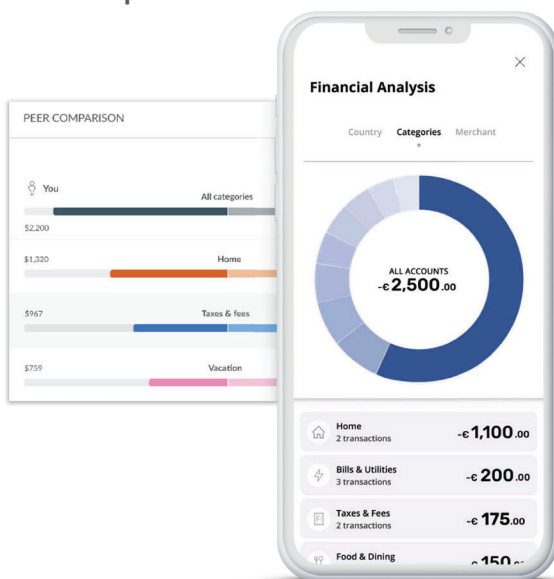
- ✓ Transactions enrichment
- ✓ Financial calendar
- ✓ Scheduled transactions
- ✓ Insights and notifications
- ✓ Account aggregation



2. ANALYSE Complete financial management

Designed with a very intuitive and friendly UI, customers can avail a variety of management features like peer comparison, breakdown of incomes and expenses, and forecasting income and expenses.

- ✓ Financial analysis
- ✓ Cashflow and balance
- ✓ Peer comparison



3. PLAN Tools to accomplish objectives

Banks can provide a unique banking service to every retail customer. They can help identify financial goals, reduce or eliminate unnecessary expenditure and set up saving plans.

- ✓ Budgets
- ✓ Saving goals
- ✓ OK to spend

