

Fox Financial Planning Network Unveils Industry-Disruptive Technology for Financial Services Sector with Intelligent Automation and Integration™ Software

Genesis Smartware™ transforms how financial institutions, technology companies and advisory firms will interact, bringing business process management, integration and workflow automation capabilities to an advanced level

SAN DIEGO, Oct. 31, 2013 /PRNewswire/ – Fox Financial Planning Network (FFPN) announced today the availability of a revolutionary new middleware software application, Genesis Smartware™, which will facilitate sophisticated integrations between industry technology providers, streamline and automate many of the daily tasks involved in providing financial advisory services, and serve as an integration translator between older legacy and newer platforms for financial institutions. Genesis provides *Intelligent Automation and Integration™*.

(Logo: <http://photos.prnewswire.com/prnh/20131031/PH07770LOGO>)

“Our software application operates in the background as a connector and translator between other key software and systems advisory firms use every day (such as CRM, forms filling, financial planning, portfolio management, file sharing, document management, Microsoft Outlook, and more) so they can be easily integrated to communicate and work together seamlessly in a collaborative workspace environment. This enables firms to finally achieve a sophisticated level of integration and interaction between their chosen technology solutions and the ability to truly automate many of their business processes. Many of us have been waiting a long time for these capabilities to become available in our industry and now it has arrived,” said Deborah Fox, CEO and Founder of FFPN.

The Genesis platform also possesses a powerful workflow engine that can be customized to systematize many of the manually intensive and higher-level business processes that exist in advisory firms, such as the new client on-boarding process, opening of new accounts, creation and presentation of financial and investment plans, meeting preparation, compliance requirements, marketing activities and more. Fox Financial Planning Network will also be embedding their highly regarded and detailed workflow system that will be fully functional and have the ability to be customized.

Through advanced technology, Genesis creates the ability for advisory firms to work in their dashboard of choice, typically offered by their CRM, which invisibly interacts with the sophisticated and integrative middleware that sits on top of and extends the capabilities of other systems to automate business processes, including the specific communications, action steps, calendaring, creation of client reports, compliance steps and much more.

Genesis is not intended to compete with any existing software platforms. “We designed Genesis to enhance existing technology and drive adoption of the more advanced features of the software advisors and their institutions are using now or will invest in the future,” noted Fox. “Genesis will complement existing systems and make them more useful and valuable, not replace them. Genesis enables advisors and their staff to use their chosen dashboard as their technology hub. The other technology solutions firms use would be integrated spokes from which daily tasks can be efficiently performed and oftentimes automated.”

More information can be found at www.GenesisSmartware.com.

About Fox Financial Planning Network

FFPN is transforming the way advisors operate by providing the tools, templates, workflows and consulting to systematize the delivery of financial advice. FFPN provides a comprehensive set of resources enabling institutions to better serve their clients and advisors to increase profitability, ensure compliance, scale their practice, while

growing their firms. FFPN is a network of financial advisors and best-in-class technology providers, consultants and other financial industry resource providers that together are improving the lives of financial advisors, their staff and their clients by helping them evolve their financial advisory businesses. www.FoxFinancialPlanningNetwork.com

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Description

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Summary

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