

Module



Wisdom™: 5300 Call Report Assistant

Boost Efficiency for Quarterly NCUA Reporting With Advanced Automation Capabilities

Expedite the gathering, organizing and uploading of your 5300 Call Report. Save time and resources with the Wisdom: 5300 Call Report Assistant from Fiserv, an innovative tool for constructing quarterly report data.



Fiserv is driving innovation in Payments, Processing Services, Risk & Compliance, Customer & Channel Management and Insights & Optimization, and leading the transformation of financial services technology to help our clients change the way financial services are delivered. Visit www.fiserv.com for a look at what's next now.

Preparing your quarterly 5300 Call Report for the NCUA can be a tedious, time-consuming process. The 5300 Call Report Assistant tool features advanced automation capabilities to help you streamline data gathering and organize your quarterly report information. Affordable for credit unions of all sizes, 5300 Call Report Assistant will save your credit union as much as 80 percent of the time traditionally required to prepare the 5300 report.

- Streamlines the data gathering, organization and uploading of 5300 Call Report information
- Features intuitive Windows®-based navigation tool for initial configuration
- Includes provisions for gathering all NCUA line items to deliver comprehensive report preparation support
- Organizes and imports data from eight different sources including the previous 5300 report, host shares, host loans, host certificates, host GL, Wisdom: Asset Liability Management and Wisdom: Investments modules and Microsoft® Office Excel® spreadsheets

Intuitive Features Deliver Comprehensive Report Preparation Support

Designed to help credit unions save time and boost efficiency surrounding the development of their quarterly NCUA reports, 5300 Call Report Assistant offers a host of useful features that enable credit unions to automate much of the quarterly 5300 Call Reporting process.

- Organizes data to match NCUA Call Report software for easy transition between the two tools
- Produces totals for cross checking and balancing
- Supports the addition of an unlimited number of notes for easy documentation
- Provides easy access to critical data like GL account numbers, host share and loan types

Connect With Us

For more information about Wisdom: 5300 Call Report Assistant, call 800-872-7882, email getsolutions@fiserv.com or visit www.fiserv.com.

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