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OMYEN Corp. Announces The Client Information Center

An advisor branded client portal that offers clients an intuitive and secured access to maintain financial information, important documents, and allows advisors to streamline the financial planning process.

WESTWOOD, Massachusetts, June 4, 2013 /PRNewswire-iReach/ -- Financial advisors are increasingly experiencing margin pressures. At the same time, more and more clients are looking for instant access to their information. Being environmentally conscious ("green") is also important to many Gen X, Gen Y, and late boomers. The Client Information Center (CIC) was designed to provide financial planning efficiency and collaborative document sharing. It also provides a powerful alert capability and integration with leading CRM packages. Priced at only $39 per advisor per month, this easy to use software can be accessed anywhere, anytime, via any computing device including tablets and smartphones.

At this time, CIC consists of three modules: Personal Information, Personal Documents, and Documents from Advisor. The personal information section consists of client's demographic, contact, and detailed personal financial information. The financial information consists of assets, liabilities, income from different source, expenses, insurance, health care, estate planning, and risk profiling questionnaire. The level of information is configurable for each advisory firm. Clients can finalize (freeze) the information and send alerts to advisors. This information automatically flows into OMYEN's Wealth Planner™ for efficient planning. It can also synch up with the advisor's CRM software. Advisors also find the updated information useful to plan for client meetings.

The Personal Documents section of the software allows clients to store important documents online. This may include a will, trust, Social Security statement, copies of drivers license and passport, important healthcare records, tax returns, etc. This functionality is very valuable for clients traveling abroad. Clients also have a choice to share a document with their advisor. The "Documents from Advisor" part of CIC provides clients instantaneous access to financial plans and other reports e.g. a performance report that an advisor may produce from a performance management system.

"CONCERT is pleased to offer our advisors the latest in software planning tools that they in turn can use with their clients to provide a well-rounded financial planning service. Our clients will benefit from the OMYEN's Client Information Center (CIC) that enables them to safely store important documents like trusts and wills online, to deliver data for comprehensive financial planning, and to exchange current information with their Advisors.", said Felipe Luna, CEO of CONCERT Global.

"In past, we presented plans to clients and clients simply listened. With the help of CIC, my clients are engaged in the planning process and I have more time to analyze.", said Jacqueline Thornhill, CFP®, CDFA™ of Landmark Advisors. “Additionally, the ability to store important client documents in the cloud and access them readily is a lot more efficient than searching my emails.”, added Thornhill.

The open architecture of Client Information Center will allow OMYEN to easily integrate third party capabilities into it. “We are already working on bringing an account aggregation functionality that advisors can license separately.”, said Dinesh Sharma, CFP®, CEO of OMYEN. “From a financial planning workflow perspective, CIC fits nicely between the Personal Financial Index® (PFI) for prospecting and the Wealth Planner™ for in-depth financial planning.”, added Sharma. Financial advisors who are not using OMYEN's other technologies can also take advantage of CIC for gathering high quality client data, synchronizing it with their CRM, offering clients a secured document management, and for collaborating with clients.

About OMYEN Corp.

Based in Westwood, MA, OMYEN, a recognized innovator of intuitive and affordable technologies, helps financial advisors effectively acquire their targeted clients and efficiently create actionable financial plans. OMYEN's unique products include the Wealth Planner™ for client centric financial planning and featuring the industry’s first retiree healthcare planning capability, the Personal Financial Index® for client education/acquisition, and the Retirement Savings Planner for advisors working with retirement plans. Employers use OMYEN's intuitive financial education and communication platform to help their employees take charge of their finances. For more information about OMYEN Corp., visit www.omyen.com.

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