



Financial Institutions Engage Next Generation with Goalsetter and Fiserv

December 1, 2021

Goalsetter platform can be offered by financial institutions as a co-branded fintech tool to help families prepare children for financial success

BROOKFIELD, Wis., December 1, 2021 – [Fiserv, Inc.](#) (NASDAQ: FISV), a leading global provider of payments and financial services technology solutions, and Goalsetter, a saving, investing and financial education platform, are partnering to enable thousands of financial institutions to bring tailored financial services to the K-12 youth market. Banks and credit unions can offer a co-branded fintech platform to the next generation of accountholders, delivering a custom debit card, wealth management options and financial education tools accessible through their digital banking platforms.

The Goalsetter platform uses games and quizzes to introduce complex financial concepts and make them relatable to everyday life. Young people can gain experience with financial activities that build wealth, such as stock market investments, and learn how to make thoughtful decisions about saving, investing and spending.

“Our goal is to transform access to financial education in America, and our partnership with Fiserv will enable us to help financial institutions cultivate the next generation of savers and investors in their own backyards,” said Tanya Van Court, founder and CEO of Goalsetter. “Working with Fiserv, our financial literacy tools can reach millions more kids and their families, helping close the wealth gap for the next generation.”

As more digitally native consumers come of age during the pandemic, services that focus on financial wellness are particularly relevant. According to the 2020 [Expectations & Experiences: COVID-19 and Household Finances](#) survey from Fiserv, younger consumers have been hit hardest financially during the pandemic, with negative financial consequences evident among half of Gen X, millennial and Gen Z consumers.

The Goalsetter platform leverages the Fiserv real-time ledger to provide financial institutions an opportunity to build loyalty with the families they currently serve while attracting new ones. Accountholders will access the Goalsetter platform through a secure link within their digital banking app, and funds visible through the Goalsetter app will be held in an account at the financial institution.

“Our partnership with Goalsetter is a great example of how Fiserv is enabling embedded finance capabilities for our financial institution clients who want to appeal to tech-savvy customers,” said Sunil Sachdev, head of Fintech at Fiserv. “With Goalsetter, families have access to tools that can build a stronger financial future for their children through their trusted financial institution.”

In addition to helping financial institutions offer Goalsetter’s white-label solutions, Fiserv is also offering banks and credit unions the opportunity to sponsor Goalsetter accounts for local schools and underserved youth through the Goalsetter Foundation initiative, “One Stock. One Future.” Fiserv is a proud supporter of the movement and recently participated by donating 1,000 shares of stock to be distributed to Black and Latinx kids across America. Fiserv was also an investor in Goalsetter’s Series A round of fundraising and partnered with Goalsetter earlier this year to fund 1,500 new Goalsetter accounts for children in at-risk communities.

In a world that is moving faster than ever before, Fiserv helps clients deliver solutions that are in step with the way people live and work today – financial services at the speed of life. Learn more at [fiserv.com](#).

About Fiserv

Fiserv, Inc. (NASDAQ: FISV) aspires to move money and information in a way that moves the world. As a global leader in payments and financial technology, the company helps clients achieve best-in-class results through a commitment to innovation and excellence in areas including account processing and digital banking solutions; card issuer processing and network services; payments; e-commerce; merchant acquiring and processing; and the Clover® cloud-based point-of-sale solution. Fiserv is a member of the S&P 500® Index and the FORTUNE® 500, and is among FORTUNE Magazine World’s Most Admired Companies®. Visit [fiserv.com](#) and [follow on social media](#) for more information and the latest company news.

About Goalsetter

Founded in 2016 by Tanya Van Court, a former Nickelodeon and ESPN executive, Goalsetter is a family saving, investing, financial education, and smart spending platform that makes it easy for the whole family to go cashless while teaching them how to be money smart. Goalsetter’s smart money platform for families provides users with an FDIC-Insured Savings Account; an investment platform powered by Goalsetter Advisors, LLC (an SEC registered investment advisor); the Mastercard Cashola Teen and Tween Debit Card with parental controls, Game-based financial education quizzes; the “Learn before you Burn” parental control feature on the debit card and the “Learn to Earn” financial reward program; as well as the latest cybersecurity features to protect user privacy. For more about Goalsetter visit [www.goalsetter.co](#).

FISV-G

Media Relations:

Ann Cave
Vice President, External Communications
Fiserv, Inc.
678-325-9435
ann.cave@fiserv.com

###