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There's a new collaborative financial management app that lets users securely establish and manage their social financial relationships. The new **Yodlee** app, called Tandem, allows users to set up financial circles from their phone contacts and social networks, with varying degrees of account access.

Tandem gives users the power to establish financial circles based on levels of trust and account sharing access. For example, an advisor may have significant access to your accounts but a child would have little or no access.

Core capabilities built into the Yodlee Tandem mobile app include:

- **Tag** individual transactions from any account for review
- **Communicate** in the context of transactions or accounts via a secure interactions space
- **Upload & share** documents, transactions, receipts, etc.
- **Transact** with full money movement including account transfers and peer-to-peer payments
- **Analyze & monitor** shared expenses by setting alerts in the shared space
- Establish and keep track of **Shared Goals**

“Keeping track of your various financial relationships has, until now, been complex and time consuming,” said Eric Connors, senior vice president of products at Yodlee. “Tandem gives you greater control of shared interactions. For example, a college student may tag several credit card transactions for reimbursement from mom and

dad. Small business partners can upload and share loan documents with a bank

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“Yodlee has been an important banking innovator for more than a decade. But unlike many established fintech providers, they continue to push out new products like a startup,” said Jim Bruene, Editor and Founder of The Finovate Group. “When I heard about Tandem and the brilliant Financial Circles, I couldn’t wait to get them to the Finovate stage. I’m confident it will be a crowd favorite.”

Financial institutions will be able to incorporate Tandem directly into their existing mobile banking platforms. By giving customers access to this powerful financial tool, banks can increase customer engagement and retention, create new revenue streams and learn more about their customers’ financial needs.

Tandem is ideal for financial circles where secure group communications, proactive alerts, and money movement are essential. Use cases include:

- Caring for elderly family members
- Working with financial advisors
- Planning with small- & micro-business partners
- Managing a child’s finances, especially in college
- Social engagements from road trips to birthday dinners
- Setting budgets with spouses
- Tracking shared expenses with roommates

In keeping with Yodlee’s commitment to consumers’ financial empowerment, all aspects of Tandem were designed with the protection of users’ financial information in mind. Tandem uses bank-level security and encryption technology and incorporates the proven safety and reliability of Yodlee’s powerful data API.

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