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Fiserv Accelerates Universal Managed Account Platform

- Fiserv leverages its robust Unified Managed Account (UMA) capabilities by integrating all managed account products into a single platform
- This represents an important milestone in the Fiserv strategy to converge technologies, which also includes integration of front-, middle- and back-office technology and data aggregation to deliver Unified Managed Household (UMH) capabilities
- New integrated managed account platform now in production for Fiserv clients

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, announced today that the new Unified Wealth Management Platform from Fiserv is now available for clients.

This Fiserv solution moves all managed account programs—including Separately Managed Account (SMA), Mutual Fund Advisory (MFA), Rep as Portfolio Manager (RPM) and Exchange-traded Funds (ETFs)—onto one, managed account platform. This new integrated system will enable Fiserv clients to provide a higher level of service to investors.

The goal is to support the industry in helping investors plan for the future, regardless of where they are on the journey to retirement. Adopting this solution enables Fiserv clients to make the investment process more manageable, with ample resources and expertise to offer holistic financial advice to their clients.

The new managed account solution from Fiserv will operate as a product-agnostic platform or chassis. Multi-sleeve accounts will continue to work as they do today. Traditional SMAs, MFAs, RPMs and ETFs will be set up as a sleeve or strategies, and clients will have the ability to seamlessly transition from single- to multi-sleeve products.

“Our vision and industry-leading work in managed accounts demonstrates the Fiserv commitment to putting our clients first. At Fiserv, we strive to provide best-in-class advisor and managed-account solutions that will bring us much closer to delivering the industry’s first end-to-end solution and UMH capabilities to the clients we serve,” said Cheryl Nash, Interim President, Investment Services from Fiserv.

About Fiserv

Fiserv, Inc. (NASDAQ: FISV) is a leading global technology provider serving the financial services industry. Fiserv is driving innovation in payments, processing services, risk and compliance, customer and channel management, and business insights and optimization. For six of the past eight years, Fiserv ranked No. 1 on the FinTech 100, an annual

international listing of the top technology providers to the financial services industry. For more information, visit www.fiserv.com.

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