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Capital Wealth Planning, LLC, Selects Fiserv For Integrated Portfolio Accounting and Trading Solutions

Growing firm turns to Fiserv for scalable, easy-to-use technology that fits the way people live and work today

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv, Inc.](#) (NASDAQ: FISV), a leading global provider of financial services technology solutions, announced today that Capital Wealth Planning, LLC, a fee-only SEC registered investment advisor (RIA) based in Naples, Florida, has selected Fiserv to support its rapid growth. The firm needed a portfolio accounting and trading platform that could grow with them, and sought easy-to-use technology that would allow them to operate efficiently while serving clients effectively. The firm also wanted a technology partner that could help them stay connected to the wealth management industry and help develop capabilities that would allow the firm to interface to Unified Managed Account (UMA) model delivery platforms.

To meet these objectives, Capital Wealth Planning will utilize Unified Wealth Platform from Fiserv for its portfolio accounting and trading platform, and Wealth Management Network from Fiserv for broader and faster industry connectivity.

“We chose Fiserv to help us achieve greater productivity and efficiency in our investment management process,” said Kevin G. Simpson, president and founder of Capital Wealth Planning, LLC. “The scalability, ease of use, and flexibility of the Fiserv platform will help us develop our technology, execute our investment strategies and better serve our clients. In choosing Fiserv, we are confident we made the right decision to grow our business.”

The Unified Wealth Platform will allow Capital Wealth Planning to support every part of the investment process with more efficient trading and reconciliation, as well as tools for active portfolio management across multiple managed-account programs and security types, including equities, fixed income, exchange-traded funds and options.

Unified Wealth Platform from Fiserv provides technology automation across the entire wealth management process, including financial planning, retirement-income analysis, portfolio management, trading, accounting, portfolio performance and reporting.

Capital Wealth Planning will also benefit from broader industry connectivity with Wealth Management Network, the premier digital destination for the wealth management industry. Wealth Management Network facilitates real-time connectivity between all major market participants: asset managers, broker-dealers, banks, aggregators and market utilities, as well as advisors, investors and third-party partners, helping to create a digital wealth management ecosystem.

“An expanding firm like Capital Wealth Planning needs a technology platform that can grow as they grow, and that provides an excellent user experience for both advisors and investors,” said Cheryl Nash, president, Investment Services, Fiserv. “By selecting technology that fits how people live and work today, and emphasizing digital connectivity, firms can stay ahead of changing investor expectations and industry demands.”

Fiserv is a market leader providing innovative wealth management solutions. Unified Wealth Platform was named “Best Technology Platform” in the 2017 Private Asset Management (PAM) Awards. Fiserv currently supports an elite list of wealth management firms, including eight of the top 10 broker-dealers and the 10 largest asset managers in the U.S., representing over \$1.4 trillion in assets on its platform.

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.

Additional Resources

- Wealth Management Solutions from Fiserv - <http://fisv.co/2l95J9W>
- Unified Wealth Platform - <http://fisv.co/2e7TrH2>
- Wealth Management Network - <http://fisv.co/2e9JU3E>

About Capital Wealth Planning, LLC

Capital Wealth Planning, LLC is a fee-only investment advisory firm based in Naples, Florida. The firm has been building and managing proprietary income-oriented portfolios since 2005. Capital Wealth Planning is at the forefront of implementing covered call strategies with its ETF Income Portfolio, Enhanced Dividend Portfolio and Covered Call Overlay Service. The methodologies are designed to enhance risk-adjusted returns and offer portfolio protection while delivering monthly cash-flow. Capital Wealth Planning is an SEC registered investment advisor (RIA). For more information, visit www.capitalwealthplanning.com.

About Fiserv

Fiserv, Inc. (NASDAQ: FISV) enables clients worldwide to create and deliver financial services experiences that are in step with the way people live and work today. For more than 30 years, Fiserv has been a trusted leader in financial services technology, helping clients achieve best-in-class results by driving quality and innovation in payments, processing services, risk and compliance, customer and channel management, and insights and optimization. Fiserv is a member of the FORTUNE® 500 and has been named among the FORTUNE Magazine World's Most Admired Companies® for four consecutive years, ranking first in its category for innovation in 2016 and 2017. For more information, visit fiserv.com.

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