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Advisors Achieve Greater Efficiency with Enhanced Unified Managed Account Capabilities from Fiserv

Updated user interface and workflow streamlines portfolio management and trading

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv, Inc.](#) (NASDAQ: FISV), a leading global provider of financial services technology solutions, is enabling financial advisors to operate more efficiently through enhanced unified managed account (UMA) capabilities. A new interface and streamlined workflow within Unified Wealth Platform from Fiserv optimize portfolio management and trading of UMA accounts, providing financial advisors with a superior user experience and the capabilities they need to better serve investors.

UMA accounts have soared in popularity as advisors and investors have increasingly demanded a holistic view of investments. In its annual report, [U.S. Managed Accounts 2017: Convergence and its Implications](#), Cerulli Associates, a global research and consulting firm that follows global asset management trends, states that the migration of managed account products onto a single architecture is helping to drive growth in the industry. The UMA has become the destination for all packaged managed account programs, including mutual fund, separate account, and ETF wrap products. Cerulli predicts that the value of UMA assets will continue to grow as part of this consolidation trend.

Unified Wealth Platform from Fiserv positions financial institutions and advisors to take advantage of this trend. Fiserv is a pioneer in flexible UMA overlay technology, with an open structure and intuitive user interface that allows advisors to shift between managed account programs, asset allocations, and even strategist selections, without administrative or operational friction.

“Unified managed accounts continue to grow in popularity because of their ability to provide a better experience for the investor and the advisor,” said Cheryl Nash, president, Investment Services, Fiserv. “As financial institutions utilize UMAs to support their managed account programs, Fiserv offers the security and scalability advisors need to manage all accounts on a single platform and service investors throughout their lives.”

Unified Wealth Platform allows for automation across the entire wealth management process, including financial planning and advice, retirement income analysis, portfolio management, trading, accounting, portfolio performance, and reporting.

The new enhancements from Fiserv allow advisors to easily access robust UMA portfolio management and trading capabilities, with more flexibility in overlay programs. A new user experience and more efficient workflow is combined with enhanced services that support decision-making, order generation, and cash management, as well as the management and

routing of proposed orders. Trading, switching between overlay managers, and investing money are more efficient, decreasing time to market. Same-day transactions and account opening improves advisor efficiency and lowers total cost of ownership for accounts while making the entire process easier for the investor. The unique hybrid UMA structure holds active and passive investments alongside multiple overlay managers within a single multi-sleeve account.

Unified Wealth Platform supports over \$1.8 trillion in assets for an elite list of wealth management firms, including 10 of the 12 top broker-dealers and the 10 largest institutional asset managers in the United States.

In a world moving faster than ever before, Fiserv helps clients deliver solutions 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 from Fiserv - <http://fisv.co/2l95J9W>
- Unified Wealth Platform - <http://fisv.co/2e7TrH2>

About Fiserv

Fiserv, Inc. (NASDAQ:FISV) enables clients worldwide to create and deliver financial services experiences 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 five consecutive years, recognized for strength of business model and innovation leadership. For more information, visit fiserv.com.

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Media Relations:

Ann Cave
Director, Public Relations
Fiserv, Inc.
678-325-9435
ann.cave@fiserv.com
or

Additional Contact:

Cristy Williams
Sr. Director, Public Relations
Fiserv, Inc.
678-375-3295
cristy.williams@fiserv.com

Source: Fiserv, Inc.