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Fiserv Enhances AdvisorVision

AdvisorVision enhances capabilities in retirement planning, asset allocation, market simulation, client proposals and presentations

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv, Inc.](#) (NASDAQ: FISV), the leading global provider of financial services technology solutions, today announced enhancements to the AdvisorVision™ solution, which further enhances the Financial Advice Solutions technology offered by Fiserv. Through AdvisorVision, Fiserv offers financial professionals a robust solution to help design goal-based financial plans, conduct market simulations, construct model portfolios, monitor plans, manage client relationships and generate client proposals.

Among the new features announced today are enhancements to retirement income planning capabilities which make it easier for financial advisors to define and communicate clearly with clients on strategies and scenarios. AdvisorVision now includes an illustration of its Roth IRA conversion strategy, allowing financial professionals to quickly and interactively model and compare these strategies. The upgrade also includes more options for illustrating income distribution by adding a sustainable withdrawal strategy. Additionally, Fiserv has made it simpler and easier to compare income gaps between essential expenses and stable sources of income while providing advisors with the solutions to fill those gaps.

To assess a client's current situation and a plan's performance under best and worst-case market conditions, Fiserv has introduced a Confidence Assessment feature to evaluate the impact on a client's retirement.

The already robust asset-allocation capabilities of AdvisorVision have been upgraded to include fixed and variable annuities into the portfolio's current and suggested asset allocation. Advisors also have more flexibility to customize their asset allocations models to meet client preferences at the individual client goal levels. Additionally, advisors can now include accounts for planning but exclude held-away accounts from the investment plan. This feature allows advisors to hold an account in the investment model and recommend allocation strategies around held-away assets.

The updated version of AdvisorVision also includes enhanced client reporting features, giving advisors the ability to generate presentations in Microsoft PowerPoint format. The presentation features are designed to be graphically rich and educational and are available for all goals, risk management modules and investment plans.

"The launch of this enhanced version of AdvisorVision reinforces our commitment to goals based planning and providing advisors greater functionality with higher efficiency," said Cheryl Nash, interim president, Investment Services from Fiserv. "These enhancements provide greater depth and flexibility, helping financial professionals to better serve their

clients. This is yet another example of our mission to put customers first by providing technology and services solutions that enable best-in-class results.”

The latest version of AdvisorVision comes on the heels of [enhancements](#) made in the fourth quarter of 2010 providing capabilities to monitor financial plans, alert advisors about important changes to their clients’ financial situations and provide access to client data via dashboards on the web or mobile devices such as iPad® and smartphones.

For more information about AdvisorVision, please visit <http://www.adviceamerica.com>

About Fiserv

Fiserv, Inc. (NASDAQ: FISV) is the leading global provider of information management and electronic commerce systems for the financial services industry, driving innovation that transforms experiences for financial institutions and their customers. Fiserv is ranked No. 1 on the FinTech 100 survey of top technology partners to the financial services industry. For more information, visit www.fiserv.com.

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