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BridgePortfolio Extends Contract with Fiserv, Citing Strength of Platform and Ability to Deliver Strategic Value

Company inks five-year contract extension for wealth management solutions from Fiserv

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, announced today that BridgePortfolio[®], Inc., has signed a five-year contract extension to use its suite of Portfolio Management and Trading solutions (formerly known as APLSM). BridgePortfolio selected Fiserv for its leadership and tenure in the industry and the ease of use and scale of its platform.

“Technology impacts our business significantly, so choosing the right provider to help us accomplish our goals was done with much consideration,” said Hal Sullivan, President and Chief Executive Officer, BridgePortfolio. “We have built a strong, positive relationship with Fiserv, and view them as a strategic partner in our success.”

“Our clients rely on our technology solutions as well as our industry knowledge and counsel. It truly is a partnership,” said Cheryl Nash, president, Investment Services, Fiserv. “By extending its use of Fiserv technology, BridgePortfolio will continue to have the flexibility and scale to accommodate new business growth.”

Chicago-based BridgePortfolio is a Back Office Outsource Provider that uses its robust technology solutions for more than 50 advisory firm partners. With nearly \$2 billion assets under administration, BridgePortfolio has a diverse menu of outsourced services that together provide a comprehensive suite of capabilities.

Fiserv technology supports all functions of the wealth management business, from planning, trading, post-trade processing and investor reporting, to fee billing and revenue management. With more than 3.7 million accounts and over one million UMA sleeves on its Unified Wealth Management Platform, Fiserv is the leader in wealth management technology and the only provider to offer an end-to-end solution.

Additional Resources:

- BridgePortfolio – <http://www.bridgeportfolio.com>

About BridgePortfolio[®]

BridgePortfolio Inc., founded in 2000, is headquartered in Chicago and is a wholly owned subsidiary of Insignis Inc. The Company has approximately 50 customers (called partners)

across the United States with almost \$2 billion in assets under administration. BridgePortfolio has developed a diverse menu of services that can be outsourced, including private label website development and hosting; efficient online account setup; account administration; performance reporting; model portfolio trading; billing; third-party separate account management and private label separate account platform creation and maintenance.

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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