

September 26, 2012



## **Fiserv Selected as Newest Affinity Provider in FPA Practitioner Resource Guide**

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, today announced that it has been named the newest affinity provider in the [Financial Planning Association](#) (FPA) [Practitioner Resource Guide](#). Fiserv joins an impressive host of affinity providers who support the financial planning process with tools that facilitate ethical and goals-based advice.

“Fiserv is committed to providing financial institutions and their advisors the most easy to use tools to support the delivery of suitable plans in accordance with updated regulatory rules and fiduciary standards,” said Cheryl Nash, president, Investment Services, Fiserv. “In becoming a member of the FPA Practitioner Guide and exchanging ideas with other industry-leading member firms, we’re confident that we are developing solutions that fully address the pressing needs of the financial advice industry.”

The FPA Practitioner Resource Guide is a robust directory of practical solutions and benefits available to FPA members to help them move their businesses forward. All participating providers are evaluated according to FPA’s professional competence, ethical conduct and quality standards. Financial Advice Management solutions from Fiserv offer powerful financial planning tools designed for use by financial advisors working directly with clients in real-world, detailed planning scenarios. These tools were designed specifically to help advisors meet the greater fiduciary standards imposed by recent industry regulations. Features such as data aggregation help advisors gain a better understanding of their clients, and thus offer more suitable advice.

FPA members will receive a 20 percent discounted rate on Financial Advice Management solutions from Fiserv, which include AdvisorVision™, an award-winning financial planning application; Proposal Generation Manager, an investment proposal tool; and Retirement Illustrator Manager, its newly released retirement income solution. Additional information about Fiserv and the FPA Practitioner Resource Guide can be found at <http://www.fpanet.org/professionals/Membership/DiscountInsurancePrograms/>.

“FPA is dedicated to providing the best financial planning tools and resources to help its members grow professionally,” said Lauren M. Schadle, CAE, associate executive director and Chief Operating Officer, FPA. “We are pleased that our members will now have access to the innovative solutions from Fiserv that they can use to further enhance customer trust, provide better financial advice and grow their practices.”

Fiserv has more than 3.7 million accounts on its wealth management platforms and over 1.3 million UMA sleeves. Its Financial Advice Management solutions, which include AdvisorVision, Proposal Generation Manager and Investor Needs Analysis, along with its acquisitions of AdviceAmerica financial planning technology and CashEdge data aggregation capabilities, position Fiserv as a leader in the financial services industry with technology that can support all functions of a wealth management business.

#### **Additional Resources:**

- Financial Planning Association – [www.FPAnet.org/professionals](http://www.FPAnet.org/professionals)
- Financial Advice Solutions from Fiserv – [www.fiserv.com/financial-advice-management](http://www.fiserv.com/financial-advice-management)

#### **About FPA**

The Financial Planning Association® (FPA®) is the largest membership organization for personal financial planning experts in the U.S. and includes professionals from all backgrounds and business models. FPA members adhere to the highest standards of professional competence, ethical conduct and clear, complete disclosure to those they serve. Based in Denver, Colo., FPA works in alliance with academic leaders, legislative and regulatory bodies, financial services firms and consumer interest organizations. For more information about FPA, visit [www.FPAnet.org](http://www.FPAnet.org) or call 800.322.4237.

#### **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](http://www.fiserv.com).

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#### **Media Relations:**

Julie Nixon  
Senior PR Manager  
Fiserv, Inc.  
+1 678-375-3744  
[julie.nixon@fiserv.com](mailto:julie.nixon@fiserv.com)  
or

#### **Additional Contact:**

Wade Coleman  
Director, Public Relations  
Fiserv, Inc.  
+1 678-375-1210  
[wade.coleman@fiserv.com](mailto:wade.coleman@fiserv.com)

Source: Fiserv, Inc.