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Fiserv and the Money Management Institute Partner on UMA Industry Research

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, today announced that it will be providing exclusive data on the managed investment solutions industry to the Money Management Institute (MMI) and Dover Financial Research. The release of this data represents an industry first and enables industry participants to track key trends within the Separately Managed Account (SMA) and Unified Managed Account (UMA) market segments. The data will help provide insight on product trends that will help wealth management firms better service their clients and grow their wealth advisory businesses. MMI will include the Fiserv data in the 4Q issue of [Central](#), an MMI quarterly publication, and subsequent issues of *Central*.

“Fiserv is committed to continuing our leadership in the managed solutions industry and providing meaningful thought leadership to our clients. Given our market presence, and the more than \$1 trillion in assets on our platforms, Fiserv can provide great insight into the trends and flows among the various managed solutions programs in the industry which will aid firms in business planning, product development, and client service,” said Cheryl Nash, president, Investment Services, Fiserv. “In partnering with leading, professional industry associations like the MMI and Dover Financial Research, we are able to leverage their longstanding, professional reputation of delivering quality research and insights into the trends impacting our industry.”

“MMI’s goal is to provide our members with access to the most comprehensive repository of data and analysis across all segments of the managed solutions marketplace,” said Christopher L. Davis, president of MMI. “Fiserv’s industry position and experience affords them access to a tremendous amount of data from broker-dealer sponsors, asset managers, and advisors. We are very pleased to partner with them to augment the research in our quarterly reports and deliver greater insights into the trends impacting UMA programs and the growth of model-based platforms to our member firms and the industry at large.”

Fiserv, with over a dozen UMA patents, has more than 3.8 million accounts on its wealth management platforms and over 1.3 million UMA sleeves. Its Unified Wealth Platform is a holistic wealth advisory platform that enables financial advisors to construct and deliver client-centric portfolio solutions for all client types from one integrated, end-to-end platform. The platform is comprised of an integration of three primary Fiserv solution suites: Financial Advice Management, Portfolio Management & Trading and Performance & Reporting, and is offered to broker-dealers, RIAs, private bankers and wealth managers in general.

Additional Resources:

- Fiserv Wealth Management Solutions - <http://www.fiserv.com/industries/wealth-management.htm>
- Money Management Institute (MMI) - <http://www.mminst.org/about-mmi/contact-us>
- *Central* from MMI - <http://www.mminst.org/category/news/mmi-central>

About the Money Management Institute (MMI)

Since 1997 MMI has been the leading voice for the global financial services organizations that provide advice and professionally-managed solutions to individual and institutional investors. Through industry advocacy, educational initiatives, regulatory affairs, data reporting and professional networking, MMI supports and advances the growth of advisory solutions. MMI members' advice-driven investment solutions serve an evolving worldwide financial landscape and their organizations are committed to the highest standards of fiduciary responsibility and ethical conduct. For more information, visit www.moneyinstitute.com.

About Fiserv

Fiserv, Inc. (NASDAQ: FISV) is a leading global technology provider serving the financial services industry, driving innovation in payments, processing services, risk and compliance, customer and channel management, and business insights and optimization. For more information, visit www.fiserv.com.

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Media Relations:

Julie Nixon
Senior PR Manager
Fiserv, Inc.
+1 678-375-3744
julie.nixon@fiserv.com

or

Additional Contact:

Wade Coleman
Director, Public Relations
Fiserv, Inc.
+1 678-375-1210
wade.coleman@fiserv.com

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