

April 10, 2013



Fiserv Adds New Features to its Unified Wealth Platform

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, today announced several new enhancements to its Unified Wealth Platform. Due to the heightened demand for holistic advice and operational efficiencies in managed accounts, Fiserv added advanced trading and modeling capabilities, enhanced user interfaces, and improved model data reporting. The enhancements are designed to benefit home office advisors, operations professionals and advisors with discretion over client assets.

Advanced Trading and Modeling Capabilities for Rep as Portfolio Managers

One of the new features for advisors with discretion over assets on the platform is expanded access and control across models. Advisors are now able to manage assets and trade across all managed account programs, including rep as portfolio manager, exchange traded funds and mutual fund advisory, all in one location for greater efficiency. Advisors will also benefit from advanced modeling capabilities, to consider and present various scenarios in discussions with clients.

“The significant user interface improvements we have made to our Unified Wealth Platform reflect the next generation vision of managed accounts developed for and with our clients,” said Cheryl Nash, president, Investment Services, Fiserv. “This is a fresh look for Fiserv, and clients who are adopting the new features of our platform are benefiting from its innovative design, consolidated views across accounts and, above all, the unparalleled integration of the front, middle and back office, as well as the resulting benefits for investors, their advisors and firms.”

Enhancements to the User Interface for Operations Professionals

Middle-office operations professionals will also benefit from new capabilities available through the Unified Wealth Platform. Fiserv has redesigned its operations user interface, adding major improvements to processing, speed and usability, so new clients migrating to the Unified Wealth Platform will find its intuitive design easy to learn. One of the main features is a Quick Access Toolbar, which provides a consolidated view of frequently used global functions, such as sleeve selection, universe selection and account searches.

Model Data Reporting

Fiserv data shows that model portfolio assets are on the rise. From 4Q 2011 through 4Q 2012, model portfolio assets climbed to \$201 billion. Assets of that size require extensive tracking. In order to provide investment managers with greater insight into assets under advisement in the model programs in which they participate, Fiserv has added model

manager reporting capabilities to the Unified Wealth Platform. In addition, an optimized login process provides single sign-on access to the middle-office component of the platform.

“Using this technology, our investment manager clients will have access to key metrics about the use and acceptance of their portfolios by participating sponsor firms,” said Nash. “With the largest lineup of Models-Only sponsors in the industry, this data will enable investment managers to track performance in a particular region or a financial advisor complex to measure performance relative to competitors.”

The Unified Wealth Platform from Fiserv represents the integration of its front-, middle- and back-office wealth management technology through three main components of the platform: Financial Advice Management (front), Portfolio Management & Trading (middle) and Performance & Investor Reporting (back). The platform can be leveraged in total by large enterprises — with multiple business lines, functions and users — or configured and deployed as individual technology components for focused business needs.

Fiserv has more than four million accounts on its wealth management platforms and over 1.3 million UMA sleeves. With the acquisitions of AdviceAmerica financial planning technology and CashEdge data aggregation capabilities, Fiserv has extended its leadership position with technology that can support all functions of a wealth management business with a truly integrated, end-to-end solution.

Additional Resources:

- Fiserv Wealth Management Solutions - <http://www.fiserv.com/industries/wealth-management.htm>

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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