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## Horizon Investments, Inc. Empowers Advisors with Integrated Portfolio Management, Trading and Rebalancing from Fiserv

*Growing asset management firm to leverage easy-to-use, scalable managed account technology to enhance efficiency and deliver better investment outcomes*

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv, Inc.](https://www.fiserv.com) (NASDAQ: FISV), a leading global provider of financial services technology solutions, announced today that Horizon Investments, Inc., a leading provider of modern goals-based investment management based in Charlotte, North Carolina, is helping financial advisors better serve their clients with superior investment operation support enabled by Fiserv technology.

“Our mission is to provide goals-based investment management strategies that empower the financial advisors we partner with to help their clients achieve their most important financial objectives throughout life,” said Robbie Cannon, chief executive officer of Horizon Investments. “The use of Fiserv technology will help us further this mission by allowing us to automate portfolio management, trading and rebalancing processes so we can operate more efficiently and scale as we grow.”

Horizon will utilize Unified Wealth Platform from Fiserv for its core portfolio management, trading and rebalancing, allowing advisors to better execute on goals-based strategies. Unified Wealth Platform will allow Horizon to support the investment process with tools for active portfolio management across multiple managed account programs and security types, including stocks, bonds, exchange-traded funds and options.

“Technology can play a significant role in helping investors achieve their life goals,” said Cheryl Nash, president, Investment Services, Fiserv. “Leveraging a technology platform that provides automation across the entire wealth management lifecycle will enable Horizon to provide an exceptional user experience to financial advisors and their clients.”

Fiserv is a market leader providing innovative wealth management solutions. In a world that is moving faster than ever before, Fiserv helps clients deliver solutions that are in step with the way people live and work today – financial services at the speed of life. Learn more at [fiserv.com](https://www.fiserv.com).

### Additional Resources

- Wealth Management from Fiserv - [fisv.co/WealthManagement](https://fisv.co/WealthManagement)
- Unified Wealth Platform - [fisv.co/UnifiedWealthPlatform](https://fisv.co/UnifiedWealthPlatform)

- Fiserv Wins WealthManagement.com Award for Portfolio Management, Accounting and Performance Reporting Enhancements - [fisv.co/wealthmanagementaward](https://www.fiserv.com/wealthmanagementaward)

## **About Horizon Investments**

Horizon is a pioneer in providing modern goals-based investment management. With a focus in goals-based investment strategies, Horizon is dedicated to helping financial advisors and their clients improve the investment experience relative to real world, prioritized financial goals. Horizon's investment process balances quantitative expertise with a qualitative perspective, including economic, fundamental and geopolitical analysis. Financial advisors turn to Horizon for innovative risk mitigation and retirement income strategies. Rooted in a global active investment approach, Horizon's GAIN PROTECT SPEND® framework, combined with its investment management methodology, has been a cornerstone of Horizon's portfolio construction process for over a decade.

## **About Fiserv**

Fiserv, Inc. (NASDAQ: FISV) enables clients worldwide to create and deliver financial services experiences in step with the way people live and work today. For 35 years, Fiserv has been a trusted leader in financial services technology, helping clients achieve best-in-class results by driving quality and innovation in payments, processing services, risk and compliance, customer and channel management, and insights and optimization. Fiserv is a member of the FORTUNE® 500 and has been named among the FORTUNE Magazine World's Most Admired Companies® for six consecutive years, recognized for strength of business model, people management, social responsibility and innovation leadership. Visit [fiserv.com](https://www.fiserv.com) and [follow on social media](#) for more information and the latest company news.

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