

March 14, 2012



## Crowell, Weedon & Co. Selects Fiserv

- Crowell, Weedon to use Portfolio Management & Trading Solutions and Financial Advisor Workbench from Fiserv to expand its advisory base
- Fiserv solutions will automate existing processes at Crowell, Weedon, providing greater efficiencies to the front- middle- and back office

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, announced today that [Crowell, Weedon & Co.](#) has selected its Portfolio Management & Trading Solutions, formerly known as Security APL, and Financial Advisor Workbench, its Rep as Portfolio Manager solution, for processing, reporting and portfolio accounting.

“The registered investment business at Crowell, Weedon has grown at a rapid rate over the past several years. It became evident that we did not have the tools in-house to accommodate this growth, so we went to market to look for the best technology and partner to help us meet this challenge,” said Andrew Crowell, managing partner, Crowell, Weedon. “We are very optimistic about our partnership with Fiserv and believe that the technology of the Portfolio Management & Trading Solutions and Financial Advisor Workbench will give us a leg up for the next wave of growth in our business.”

Portfolio Management & Trading Solutions from Fiserv enable fee-based program sponsors and investment professionals to manage all of their products using a single ASP-based solution. Crowell, Weedon will leverage Fiserv technology through OneView<sup>SM</sup> from Fiserv, an intuitive, roles-based interface that enables users to quickly and efficiently navigate the platform while offering better service to their investors.

Additionally, the Southern Calif.-based regional broker-dealer will leverage Financial Advisor Workbench from Fiserv, which supports more than 124,000 accounts nationwide. Financial Advisor Workbench offers a suite of portfolio accounting tools for fee-based assets that will enable advisors at Crowell, Weedon to grow their business by leveraging the network of managers at Fiserv and the solution’s unparalleled modeling and automated trading capabilities.

“Through our [partnership](#) with Crowell, Weedon, we are confident that the best-in-class connectivity, scalability and robust functionality of Fiserv technology will fulfill their current and future investment advisory requirements,” said Cheryl Nash, president, Investment Services, Fiserv. “The common goal shared by Fiserv and Crowell, Weedon is our dedication to putting clients first. Fiserv technology will equip new and existing Crowell, Weedon advisors with a competitive advantage, by streamlining workflow and creating operational efficiencies designed to free the advisor to spend more time with clients. We know that when advisors have more time with clients, they are in a better position to grow their business and deliver a higher level of service.”

With more than 3.6 million accounts and 1.3 million UMA sleeves on its Wealth Management Platform, Fiserv is the market leader in the managed accounts industry. With financial planning technology through its acquisition of AdviceAmerica, and data aggregation capabilities through its acquisition of CashEdge, Fiserv remains the leader in the financial services industry with technology that can support all functions of a wealth management business, from planning, trading, post-trade processing and investor reporting to fee billing and invoicing.

#### **Additional Resources:**

- Learn more about this partnership in a brief video with Andrew Crowell - <http://bcove.me/nuji3yn0>
- Crowell, Weedon & Co. - <http://www.crowellweedon.com>

#### **About Crowell, Weedon & Co.**

Crowell, Weedon & Co. is a Regional Broker Dealer located in Southern California. For more than 80 years, Crowell, Weedon & Co. advisors have served individuals, families and leading businesses. The financial professionals at Crowell, Weedon & Co. are dedicated to providing a full range of investment strategies and services to meet client's personal financial management goals.

#### **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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Source: Fiserv, Inc.