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## Four Million Accounts Now Managed and Traded on Industry-Leading Unified Wealth Platform from Fiserv

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, today announced the number of portfolios managed and traded on the company's wealth management platform has topped 4 million. This significant milestone reflects the continued demand for financial advice and managed account expertise, and the competitive advantages and continued growth of the Unified Wealth Platform, the industry's leading front-, middle- and back-office wealth management technology platform.

To reach this milestone, Fiserv helped existing clients launch new programs and added net new clients across its various managed account programs, including Unified Managed Accounts (UMA), Mutual Fund Advisory and Separately Managed Accounts (SMA). The number of portfolios on the platform increased from 3 million accounts in 2009 to 4 million today, a 33 percent increase over four years. Growth was strongest in the broker-dealer and bank segments. The broker-dealer segment increased from 1.2 million in 2009 to 2.05 million accounts today, and the bank segment increased from 1.3 million in 2009 to 1.4 million accounts today. The manager segment, which includes registered independent advisors (RIA), now has 550,000 accounts, up from 547,000 accounts in 2009.

"Reaching the 'four million managed accounts' milestone is evidence of the value of advisors in this marketplace, and our commitment to meeting, anticipating and exceeding client needs as we remain the preferred technology partner with the wealth management industry," said Cheryl Nash, president, Investment Services, Fiserv. "By hiring the best people, deploying cutting-edge technology and making strategic acquisitions, we have been able to grow the number of accounts on our Unified Wealth Platform 33 percent in just over four years. This is particularly impressive given market volatility, changes in the financial advice industry and challenges for our economy and individual investors since the financial crisis."

The Unified Wealth Platform from Fiserv enables financial advisors to construct and deliver client-centric portfolio solutions for all client types from one integrated, end-to-end platform. It has three main components – Financial Advice Management (front), Portfolio Management & Trading (middle) and Performance & Reporting (back). It 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.

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

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