

October 15, 2013



## **Fiserv to Present Best Technology Practices for Delivering Actionable Financial Advice at FPA Experience 2013**

- Fiserv will join Retirement Security Centers in a strategic alliance to present at the FPA's prestigious Major Firms Symposium
- Presentation reveals how financial professionals can produce higher quality service and advice
- Retirement Security Center to demonstrate the value that Retirement Illustrator from Fiserv adds to their business

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, announced today that it will present with Retirement Security Centers (RSC), at the Major Firms Symposium for senior executives during the FPA Experience 2013 Conference in Orlando, FL. The presentation will be held on Saturday, October 19, at 12:30 p.m. ET. Attendees will gain valuable insight on how to increase sales revenue and client collaboration by leveraging illustrated retirement planning technology to deliver actionable financial advice. RSC will also provide a live demonstration on how this technology has been successfully applied in its practice using Retirement Illustrator™ from Fiserv.

Pierre Bossaert, MS pfp, CFP®, QFP from Fiserv will join Briggs Matsko, CFP®, CRPC® and Jeff Maas CFP®, ChFC®, CRPC® to deliver the presentation. Matsko and Maas are CERTIFIED FINANCIAL PLANNERS™ and co-founders of RSC, headquartered in Sacramento, Calif.

The joint presentation will reveal how financial professionals can produce higher quality service and advice, which is much-desired by investors across the nation. According to an August 2013 survey published by the Certified Financial Planner (CFP) Board of Standards, a nonprofit organization fostering professional standards in financial planning, a large majority of Americans now seek holistic financial planning and advice. The CFP Board finds that 70 percent of those surveyed “prefer an advisor who has the ability to look at their whole financial situation, as opposed to an advisor who specializes in one area,” such as investments.

“Advisor desktop technology yields high value and will be a top area of investment for wealth management firms in the next 12 months and beyond,” said Darrin Courtney, research director, CEB TowerGroup. “There are already very strong solutions available in the market today, with technology providers such as Fiserv that have delivered on the current need and are continuing to move in the right strategic direction.”

“Fiserv recognizes that financial professionals must provide interactive, holistic financial advice as a means to increase client collaboration and the execution of their strategic investment plans,” said Cheryl Nash, president, Investment Services, Fiserv. “We are particularly energized about the sizable increases in profitability and productivity that are being recognized by our client firms and financial advisors across the wealth management industry after adopting our technology.”

Fiserv will also be offering complimentary consultations during FPA Experience 2013. Situated at Exhibition Booth #207 in the West Hall of Orange County Convention Center, Fiserv will share additional expertise and functional demonstrations of its technology, including Retirement Illustrator and AdvisorVision™, the financial planning solution ranked “Best-in-Class” by CEB TowerGroup in July 2013. In addition, Matsko and Maas will join Fiserv at the booth to demonstrate the value Retirement Illustrator adds to their business.

### **Additional Resources:**

- FPA Experience 2013 - <http://www.fpaexperience.org/>
- Lincoln Financial Group - <http://www.lfg.com>
- Retirement Security Centers - <http://www.retirementsecuritycenters.com/>
- Certified Financial Planner Board of Standards - <http://www.cfp.net/>

### **About Retirement Security Centers**

Briggs Matsko and Jeff Maas are registered representatives of Lincoln Financial Advisors Corp. Securities and advisory services offered through Lincoln Financial Advisors Corp., a broker/dealer (member SIPC) and registered investment advisor. Insurance offered through Lincoln Marketing and Insurance Agency, LLC and Lincoln Associates Insurance Agency, Inc. Retirement Security Centers is not an affiliate of Lincoln Financial Advisors Corp. CRN 201310-2086163.

### **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).

FISV-G

### **Media Relations:**

Julie Nixon  
Senior Public Relations Manager  
Fiserv, Inc.  
678-375-3744  
[julie.nixon@fiserv.com](mailto:julie.nixon@fiserv.com)

or

### **Additional Contact:**

Wade Coleman  
Director, Public Relations  
Fiserv, Inc.

678-375-1210

[wade.coleman@fiserv.com](mailto:wade.coleman@fiserv.com)

Source: Fiserv, Inc.