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Geneos Wealth Management Selects the Unified Wealth Platform from Fiserv

- Geneos will leverage portfolio management, trading and performance capabilities of the Unified Wealth Platform
- Unified Wealth Platform provides the tools for active portfolio management, decision support and trading across multiple managed-account programs

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, announced today that Geneos Wealth Management, Inc., a leading independent hybrid RIA/broker dealer, has signed on to use the portfolio management and trading capabilities of the Unified Wealth Platform from Fiserv to run its model portfolio business, which includes Unified Managed Accounts (UMA), Separately Managed Accounts (SMA) and Mutual Fund Advisory (MFA). They will also leverage Performance Reporting from Fiserv for high-level performance calculations.

"We originally intended to build out our own in-house platform, but after hearing the Fiserv value proposition, we decided the Fiserv solution would save us money, time and resources," said Dean Rager, senior vice president, Geneos. "Upon meeting with the Fiserv team, we quickly recognized the benefits of the Unified Wealth Platform and are very excited to begin this relationship. Fiserv is an established and trusted technology provider so the decision to sign was a relatively easy one. We are confident that Fiserv will scale with us as we grow our business."

The Unified Wealth Platform from Fiserv will allow Geneos straight-through processing, more efficient trading and reconciliation, and the ability to automatically process more account activity daily with the tools for active portfolio management, decision support and trading across multiple managed-account programs. These trading applications are comprised of decision support tools for developing investment strategies and creating trade scenarios based on the current trading environment or on established parameters. Geneos had previously used an in-house Unified Managed Accounts system that didn't allow for the firm's projected growth and product expansion.

"By selecting Fiserv, Geneos gains a partner with the ability to help it meet its strategic needs," said Cheryl Nash, president, Investment Services, Fiserv. "Leveraging the advanced trading and modeling capabilities of our Unified Wealth Platform, Geneos will be able to focus on what's most important to them: business growth and product automation. Fiserv is ready to help Geneos bring its goals to fruition."

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.

Additional Resources:

- Wealth Management Solutions from Fiserv - <http://www.fiserv.com/wealth-management>
- Geneos Wealth Management - <http://www.geneoswealth.com/>

About Geneos

Geneos is a leading broker/dealer headquartered in Denver, Colo., providing financial and estate-planning services through a select network of registered representatives. The firm's 275 high-quality advisors around the nation represent \$10 billion in client assets under management. Geneos advisors offer a complete array of wealth management products, including mutual funds, alternative investment options, fixed and variable annuities, and life insurance company products. For more information, visit <http://www.geneoswealth.com>.

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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