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AdvisorVision from Fiserv Enhanced to Enable Comprehensive Cash Flow Planning and Progressive Tax Analysis

- Goals-based financial planning solution enhanced to enable complex, comprehensive cash flow analysis
- Progressive tax analysis now possible, allowing advisors to help clients better assess and mitigate long-term tax liabilities
- Solution designed for seamless integration with enterprise investor portals to help increase advisor-client collaboration

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, announced today that AdvisorVision™, a goals-based financial planning application, has been enhanced with cash-flow based financial planning and progressive tax analysis. The release allows the use of either goals- or cash-flow based methodologies, enabling advisors to serve the needs of clients with either simple or complex financial planning needs, thus strengthening the advisor's value to a broader range of clients.

When using the comprehensive cash-flow approach now available in AdvisorVision from Fiserv, advisors can analyze the cash in-flows and out-flows over a client's lifetime, across all financial goals, and expose risk and debt in a single, illustrative view. Advisors can also create a nearly unlimited number of investment scenarios and strategies with side by side comparisons, to provide clients with an intuitive explanation of the advice being offered.

Advisors can also model the lifetime tax impact of investment decisions with AdvisorVision's new progressive tax engine, providing greater insight to help clients control the amount or timing of plan contributions, withdrawals, deductions, conversions, gifts and donations. Progressive tax analysis helps advisors manage more complex, multi-goal financial needs and, therefore, higher asset-size portfolios.

AdvisorVision is the front-office component of the Unified Wealth Platform from Fiserv and is designed to be seamlessly integrated with existing enterprise investor portals. AdvisorVision increases engagement and collaboration between advisors and clients — a best technology practice in the wealth management industry today.

"Financial advisors overwhelmingly prefer solutions that can be integrated with investor-facing technology as a part of their strategic approach to improving the quality of advice delivered," said Darrin Courtney, research director, CEB TowerGroup. "When deployed in

tandem with investor-facing portals, advisor desktop technology drives client collaboration and financial services technology providers like Fiserv are keenly aware of this.”

In January 2014, CEB TowerGroup named AdvisorVision as a “best practice portal example” in the report, *Using Portals to Enhance Client Engagement: A Threat Becomes an Ally*. CEB TowerGroup found that wealth management firms should design their investor-facing portals to enhance advisor-client collaboration. Advisor solutions like AdvisorVision and Retirement Illustrator™ from Fiserv can be integrated with investor-facing portals to meet this objective.

“Advisor solutions are a key conduit in building long-term relationships based on the highest standards of service, accountability and trust,” said Cheryl Nash, president, Investment Services, Fiserv. “The latest enhancements to AdvisorVision from Fiserv help deepen the advisor’s value to clients and enable firms to support more complex, higher asset-size portfolios. AdvisorVision is also designed to complement investor-facing portals with the synergistic data aggregation that drives collaboration. We are releasing this new version of our solution with genuine enthusiasm about the benefits it offers firms.”

Additional Resources:

- AdvisorVision from Fiserv - <http://www.fiserv.com/industries/wealth-management-solutions/advisorvision.htm>
- Retirement Illustrator from Fiserv - <https://www.fiserv.com/industries/wealth-management-solutions/retirement-illustrator.htm>
- CEB TowerGroup - <http://www.executiveboard.com/exbd/financial-services/tower-group/index.page>

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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