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## **Fiserv Adds Digital Retirement Planning Solution to its Wealth Management Network in Partnership with Vestwell**

*Single platform strategy unites retirement planning and wealth management*

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv, Inc.](#) (NASDAQ: FISV), a leading global provider of financial services technology solutions, announced today that it is integrating digital retirement platform Vestwell into its Unified Wealth Platform. This will enable financial advisors to access retirement planning and wealth management tools on a single platform, improving efficiency and facilitating a better experience for advisors and their clients.

Vestwell will also join the Wealth Management Network from Fiserv, which connects participants across the managed accounts industry.

“Our partnership with Vestwell brings retirement planning and wealth management together, empowering financial advisors while expanding the offerings and enhancing the value they can bring to their clients,” said Cheryl Nash, president, Investment Services, Fiserv. “The ability to offer a flexible, turnkey retirement platform provides advisors with a strong touchpoint and benefits peoples’ financial lives by reducing the time to investment and elevating the digital experience.”

Through the partnership, Fiserv and Vestwell are providing single access point convenience and low-cost, high-value automation, allowing advisors to open a 401(k) that sits alongside their clients’ other accounts that are managed either directly or through a third-party.

Vestwell is the only digital retirement platform that fully integrates the advisor, company and employee experience through a modern, configurable interface. The white-labeled solution allows advisors to deliver a consistent client experience through an open-architecture, multi-custodial, multi-record-keeping platform. Advisors have the option to bundle or unbundle their services while also leveraging administrative and fiduciary services as needed to scale their own advisory business.

Asset managers can also benefit from the solution, which enables them to provide mutual fund and ETF strategies that are managed based on risk tolerance or target retirement dates. As the DOL Fiduciary Rule is implemented, Vestwell helps asset managers align with the new regulations.

“Technology is fueling an industry movement towards holistic planning by helping advisors incorporate retirement planning services that extend beyond the reaches of wealth management,” said Aaron Schumm, founder and CEO, Vestwell. “Our partnership with Fiserv will serve to remove the administrative burden that advisors experience when

implementing retirement plans, and will provide advisors with the tools they need to best serve their clients.”

Fiserv is a market leader providing innovative investment services solutions with five million managed accounts supported on its Unified Wealth Platform, representing over \$1.4 trillion in assets under management. The Wealth Management Network from Fiserv provides industry access to a vast network of 70 sponsor firms, including eight of the top ten broker-dealers in the U.S., and support for approximately 300 asset managers with easy access to hundreds of model portfolio strategies. This facilitates real-time digital connectivity among all major market participants, including asset managers, broker-dealers, custodians, banks, aggregators, market utilities, advisors, investors and third-party partners.

In a world that is moving faster than ever before, Fiserv helps clients deliver solutions that are in step with the way people live and work today - financial services at the speed of life. Learn more at [fiserv.com](http://fiserv.com).

### **Additional Resources**

- Wealth Management from Fiserv - <http://fisv.co/2l95J9W>
- Unified Wealth Platform - <http://fisv.co/2e7TrH2>
- Wealth Management Network - <http://fisv.co/2e9JU3E>

### **About Vestwell Holdings, Inc.**

Vestwell Advisors, LLC is a SEC registered investment advisor, a wholly owned subsidiary of Vestwell Holdings, Inc., specializing in 401(k), 403(b) and other defined contribution and benefit retirement investment management services. Built by an experienced team with an average of 18 years in financial technology, Vestwell assumes 3(38) investment management and ERISA(16) fiduciary responsibility on the behalf of advisors and their plan sponsor clients. Learn more at [Vestwell.com](http://Vestwell.com) and on Twitter [@Vestwell](https://twitter.com/Vestwell).

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### **About Fiserv**

Fiserv, Inc. (NASDAQ: FISV) enables clients worldwide to create and deliver financial services experiences that are in step with the way people live and work today. For more than 30 years, Fiserv has been a trusted leader in financial services technology, helping clients achieve best-in-class results by driving quality and innovation in payments, processing services, risk and compliance, customer and channel management, and insights and optimization. Fiserv is a member of the FORTUNE® 500 and has been named among the FORTUNE Magazine World's Most Admired Companies® for four consecutive years, ranking first in its category for innovation in 2016 and 2017. For more information, visit [fiserv.com](http://fiserv.com).

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