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## **Fiserv Transforms User Experience on its Unified Wealth Platform**

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**BROOKFIELD, Wis., November 17, 2016** – [Fiserv, Inc.](#) (NASDAQ: FISV), a leading global provider of financial services technology solutions, today announced enhancements to its Unified Wealth Platform. A new user experience and interface developed by Fiserv allows financial advisors and operations professionals to more efficiently and quickly access the tools they need to support and manage multiple managed account programs.

The platform's new user experience transforms the support of rep-managed accounts (RPM and RPA), separately managed accounts (SMA) and mutual fund advisory (MFA) programs by delivering simplified access and dashboard-driven workflow. By optimizing operational support, this single platform creates efficiencies and frees up more time for advisors to better engage their clients and build and deepen relationships.

"Steady growth in the managed account industry requires greater user efficiency that can only be achieved through digitization in wealth management. Fiserv is focused on delivering innovative and transformational solutions that help our clients grow their business and meet the needs of their investors," said Cheryl Nash, president, Investment Services, Fiserv. "Our enhanced Unified Wealth Platform gives the stability, security and scale we have always offered, but now with a more advanced digital experience and greater integration of capabilities on our single platform."

With the Department of Labor (DOL) fiduciary rule going into effect next year, a single platform to support all advisory programs is critical. The Mutual Fund Advisory offering from Fiserv, coupled with a highly scaled, rule-based rebalancing algorithm, offers an ideal, efficient and cost effective environment for supporting low-balanced accounts. Advanced monitoring and reporting capabilities may be used to facilitate compliance with the DOL rule. In addition, the capabilities for SMA offer a more efficient workflow for money managers across equity and fixed-income asset classes, helping them to better grow and manage their business.

Unified Wealth Platform from Fiserv provides technology automation across the entire wealth management process, including financial planning, retirement-income analysis, portfolio management, trading, accounting, portfolio performance and reporting. Fiserv currently supports nearly five million managed accounts and \$1.4 trillion in assets for an elite list of wealth management firms, including eight of the top 10 broker-dealers and the 10 largest asset managers in the U.S.

"Improved client service and investor experience is the primary value driver for almost all front- and back-office technology initiatives of wealth management firms today," said Darrin Courtney, research director, CEB TowerGroup. "However, improving the user experience of the firm's own professionals is a logical first step in being able to deliver more for the investor."

The new user enhancements to Unified Wealth Platform follow enhanced advisor and investor reporting capabilities that were introduced after completing an integration with [InvestEdge](#) in October 2015, as well as new [rep-as-portfolio manager \(RPM\) tools announced](#) by Fiserv in March 2016.

Fiserv is a market leader providing innovative wealth management solutions and was recently named as "Best Outsourced Technology Infrastructure Provider" in the 2016 U.S. Mutual Fund Services Awards. The Wealth Management Network from Fiserv is the premier digital destination for the wealth management industry that facilitates real-time connectivity between all major market participants: asset managers, broker-dealers, banks, aggregators and market utilities, as well as 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 [TheSpeedofLife.com](http://TheSpeedofLife.com).

## Additional Resources

- | [Unified Wealth Platform from Fiserv](http://fisv.co/2e7TrH2) - <http://fisv.co/2e7TrH2>
- | [Wealth Management Network from Fiserv](http://fisv.co/2e9JU3E) - <http://fisv.co/2e9JU3E>
- | [Client Case Study](http://fisv.co/2dJOBmp) – A Large Wealth Management Firm Transforms its Advisory Business - <http://fisv.co/2dJOBmp>
- | [Press Release - Fiserv Partners with InvestEdge to Expand Reporting Capabilities for the Wealth Management Industry](http://fisv.co/2eglRNG) - <http://fisv.co/2eglRNG>
- | [Press Release - Fiserv Develops New RPM and RPA Portfolio Management and Trading Technology Solutions to Enhance Its Unified Wealth Platform](http://fisv.co/2esk6TI) - <http://fisv.co/2esk6TI>

## About Fiserv

Fiserv, Inc. (NASDAQ: FISV) enables clients to achieve best-in-class results by driving quality and innovation in payments, processing services, risk and compliance, customer and channel management, and business insights and optimization. For more than 30 years, Fiserv has been a global leader in financial services technology. Fiserv is a FORTUNE 500 company and in 2016 was honored to be named a FORTUNE magazine's World's Most Admired Company for the third consecutive year. In 2015 the company was recognized among Forbes magazine's America's Best Employers. For more information, visit [Fiserv.com](http://Fiserv.com)

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