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Fiserv Enhances Unified Wealth Platform with Advanced Capabilities for the Rep as Portfolio Manager Program

- | Advisors serving as portfolio managers (or rep as portfolio managers) will now have access to tools that enable greater customization, configurability and graphical displays
- | Advisors using Fiserv proposal capabilities will have integration with dynamic and composite models, increasing their choice of suitable investment strategies for each investor
- | These enhancements to the Unified Wealth Platform further advance technological integration by providing advisors both front- and middle-office capabilities from one platform

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, today announced several major enhancements to its Unified Wealth Platform, with new functionality for rep as portfolio managers or advisors with discretion over a client's assets.

Today's investors are seeking advice from qualified advisors as they assess their financial objectives and consider how to diversify their portfolios for both stability and future growth. Due to their enhanced service to investors, financial institutions that leverage rep as portfolio manager programs have experienced steady growth. To serve the needs of this growing market, Fiserv has added this functionality to its platform.

Rep as portfolio managers using the enhanced technology from Fiserv will now find it easier to manage and trade on the platform with new options for customization, configurability and graphic displays of data. A next-generation user interface provides access to advanced features and functions in the rep as portfolio manager solution, including tax harvesting tools, new dashboards, single-click access to account details and timely trading.

Another key enhancement leverages the Model Management solution from Fiserv as a repository for all rep as portfolio manager investment models. Fiserv clients will now have all managed account models — including rep as portfolio manager, but also exchange traded funds, unified managed accounts, mutual fund advisory and separately managed accounts — in one location. Advisors using proposal capabilities within the Fiserv solution will be able to look across all investment strategies at their firm to choose the most suitable ones for their clients.

"We believe the demand by investors for professional financial advice will continue to grow, with greater demand for the rep as portfolio manager. The enhancements announced today are designed to increase the effectiveness and efficiency of those advisors," said Bob Fedele, senior product manager, Investment Services, Fiserv. "These advanced rep as portfolio manager capabilities represent only the first iteration of a broad initiative to provide all advisors with integrated technology for investor reporting, client relationship management, financial planning, proposal generation and data aggregation."

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). It 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.

"These enhancements further illustrate how we are listening to clients and are responding with the tools they need to serve their investors, as we advance our Unified Wealth Platform, the only truly integrated technology platform for the wealth management industry," said Cheryl Nash, president, Investment Services, Fiserv. "No other technology company owns each individual component or has the vision, scale, expertise, financial strength and stamina to complete all the iterative development projects required to realize technological convergence."

Fiserv has more than 3.7 million accounts on its wealth management platforms and over 1.3 million UMA sleeves. With the acquisitions of AdviceAmerica financial planning technology and CashEdge data aggregation capabilities, Fiserv has extended its leadership position with technology that can support all functions of a wealth management business with a truly integrated, end-to-end solution.

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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