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USAA Selects AdviceAmerica Technology to Enhance Retirement Advice, Planning and Savings Capabilities for Members

Customized online retirement savings and distribution tool gives USAA members personalized financial advice

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv, Inc.](#) (NASDAQ: FISV), the leading global provider of financial services technology solutions, announced today that USAA selected [AdviceAmerica](#) technology, recently acquired by Fiserv, to provide its members with an online retirement savings and distribution tool.

The product enables members to evaluate their existing retirement portfolio and provides recommendations to help members reach their personal retirement goals. USAA will use AdviceAmerica's forecasting models, cash flow and advice engine technologies in concert with its proprietary portfolio allocation and investment product recommendations to offer its members a detailed solution and personalized experience to different member segments.

"Our goal is to help every member plan for their future, regardless of where they are on their journey to retirement, and teaming up with Fiserv will allow us to offer easy-to-use, interactive financial planning tools that members can use anywhere, anytime," said Dan McNamara, president of USAA Investment Management Company. "The combination of online tools and access to free advice from our financial advisors will give members the information they need to plan for the retirement they really want."

The tool will help members better define their retirement goals and determine if they are on track to meet them by comparing their current portfolio against USAA's model portfolio based on the individual's risk tolerance. Members also can take action to help balance their portfolio to a more comprehensive mix designed to be commensurate with their risk profile.

"USAA is an organization with a deep history of technological innovation and customer service, and by being among the first to integrate these tools, they are reinforcing that commitment," said Cheryl Nash, senior vice president of strategic marketing and business development for Investment Services of Fiserv. "The customizable, integrated solutions offered by Fiserv enable organizations like USAA to add advanced financial planning technology, while remaining on their existing platform. Fiserv is committed to providing best-in-class solutions that understand the individual needs of advisors and members."

Links in this release:

Fiserv, Inc. - <http://www.fiserv.com>

AdviceAmerica - www.adviceamerica.com

About Fiserv

Fiserv Inc. (NASDAQ: FISV) is the leading global provider of information management and electronic commerce systems for the financial services industry, driving innovation that transforms experiences for financial institutions and their customers. Fiserv is ranked No. 1 on the FinTech 100 survey of top technology partners to the financial services industry. For more information, visit www.fiserv.com.

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