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Fiserv Enhances its Financial Advice Solutions with Morningstar's Best-in-Class Investment Data

- Integrating databases allows advisors to analyze and propose new investment portfolios based on historical simulations and statistics
- Powerful advice platform enables Fiserv customers to better serve their clients' increasingly complex retirement goals

BROOKFIELD, Wis.--(BUSINESS WIRE)-- Fiserv, Inc. (NASDAQ: FISV), the leading global provider of financial services technology solutions, announced today that it will enhance its Financial Advice Solutions by integrating best-in-class data and analytics from Morningstar.

The agreement with Morningstar, Inc., a leading provider of independent investment research, will integrate a number of Morningstar databases into the front-office Financial Advice Solutions from Fiserv, which provide robust retirement income modeling, financial planning and Monte Carlo simulations. With the new integrated modules powered by Morningstar data, advisors will be able to access, analyze and propose multi-vehicle, multi-asset class investment portfolios with historical simulations and related performance statistics.

The front-end analytics engine from Fiserv will include Morningstar's returns and holdings-data for U.S. mutual funds, exchange-traded funds (ETFs), separately managed accounts (SMAs) and individual U.S. equities. In addition, advisors will now have access to the Morningstar Rating™ for funds as well as dozens of industry-leading style and asset-class benchmarks from Morningstar.

"With the integration of Morningstar's expansive investment data and analytics into our solutions, we will now be able to provide our advisor clients with enhanced investment modeling and proposal capabilities," said Brandon Sharrett, senior vice president, sales, Investment Services at Fiserv. "The combination of a robust investment analytics engine along with comprehensive financial and retirement planning tools offers our clients a powerful advice platform to serve their customer's increasingly complex retirement goals."

Fiserv solutions consist of investor profiling, proposal development, financial and investment planning, CRM and retirement income solutions. Fiserv is the only technology provider that has an integrated front-middle-back office solution set for Advisors and Managed Account participants.

Additional Resources

- Morningstar - http://www.morningstar.com/

About Morningstar

Morningstar, Inc. is a leading provider of independent investment research in North America, Europe, Australia and Asia. The company offers an extensive line of Internet, software and print-based products and services for individuals, financial advisors, and institutions. Morningstar provides data on approximately 380,000 investment offerings, including stocks, mutual funds, and similar vehicles, along with real-time global market data on more than 5 million equities, indexes, futures, options, commodities and precious metals, in addition to foreign exchange and Treasury markets. Morningstar also offers investment management services and has approximately $138.7 billion in assets under advisement and management as of March 31, 2011. The company has operations in 26 countries.

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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