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## **Fiserv Develops New RPM and RPA Portfolio Management and Trading Technology Solutions to Enhance Its Unified Wealth Platform**

*New tools provide greater efficiency for advisors, enabling better collaboration with their investors*

- | New advisor tools enable support for all advisor portfolio management and trading needs on a single platform, the Unified Wealth Platform from Fiserv
- | Over 5,000 advisors and users supporting RPM or RPA programs have been successfully migrated to the enhanced platform
- | Integration of advisor technology into the Unified Wealth Platform is a major strategic milestone toward platform consolidation in managed accounts
- | New tools enable greater customization, configurability and graphical displays for advisors, along with targeted workflows from a single dashboard

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv, Inc.](#) (NASDAQ: FISV), a leading global provider of financial services technology solutions, today announced the addition of new advisor portfolio management and trading technology to its Unified Wealth Platform, the company's single platform for portfolio management, trading, accounting and reporting for managed accounts. Over 5,000 advisors and users supporting rep as portfolio manager (RPM) or rep as advisor (RPA) programs have successfully migrated to the enhanced platform.

This new technology benefits:

- | Broker-dealers, who will enjoy greater operational efficiency across their managed account businesses with advisor capabilities available from the Unified Wealth Platform
- | Asset or model managers, who will have increased distribution opportunities as more financial advisors migrate to the Unified Wealth Platform, which also has integrated model-portfolio management solutions
- | Financial advisors, who will be able to streamline workflow through enhanced portfolio management and trading tools, and manage full-discretion and non-discretionary accounts on a single platform
- | Investors, who will receive greater clarity, insight and efficiency from their advisors when they leverage the new tools

"Today's investors are seeking goals-based advice from qualified advisors as they assess their financial objectives and consider how to diversify their portfolios for both stability and future growth," said Cheryl Nash, president, Investment Services, Fiserv. "Advisors utilizing RPM and RPA programs have experienced steady growth, largely due to their ability to provide enhanced services that are in step with investors' evolving needs. Fiserv ensures that our clients have the tools and technology to provide wealth management services at the speed of life."

Financial advisors using the enhanced Unified Wealth Platform find it easier to manage and trade on the platform with new options for customization, configurability and graphical displays of data. The new user interface provides advisors with access to advanced features and functions, including tax harvesting tools, new dashboards, single-click access to account details and timely trading.

Another key capability leverages the model management solution from Fiserv as a repository for investment models. Fiserv clients now have all managed account investment models - covering RPM and RPA, as well as mutual fund and exchange-traded fund advisory (MFA/ETF), separately managed account (SMA) and unified managed account (UMA) programs - in one location. Advisors using proposal capabilities within the Unified Wealth Platform can look across all approved investment strategies at their firm to choose the most suitable product for their clients.

Results of a recent poll summarized in the CEB TowerGroup report, "Driving Advisor Performance with Frontline Wealth Technologies," found that streamlined or integrated advisor technology highly correlated to the adoption and effectiveness of these tools.

"With frontline technology key to driving advisor performance, it is imperative that advisor tools be as integrated as possible," said Darrin Courtney, research director, CEB TowerGroup. "The rise of rep-as-portfolio-manager and rep-as-advisor programs demands a more holistic approach to both wealth management and the technology behind it — which ultimately benefits the investor."

Fiserv is a market leader providing innovative investment services solutions with more than four million managed accounts supported on its Unified Wealth Platform, representing over \$1.3 trillion in assets. The Unified Wealth Platform is tailored for wealth management firms with a highly-configurable user interface and dashboard, which enables seamless workflow navigation and integrated support of all discretionary managed account programs (ETF, MFA, RPM, SMA, UMA). Large enterprises can leverage the Unified Wealth Platform to integrate front, middle, and back-office wealth management technology, while increasing automation, straight-through processing and end-to-end workflow.

### **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 leader in financial services technology, and today is among FORTUNE<sup>®</sup> magazine's World's Most Admired Companies and Forbes magazine's America's Best Employers. For more information, visit [www.fiserv.com](http://www.fiserv.com).

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