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Fiserv Enhances AdvisorVision™ Financial Planning Product Line

AdvisorVision 7.5 adds alert and plan monitoring capabilities, including mobile access

Brookfield, Wis., October 27, 2010 - [Fiserv, Inc.](#) (NASDAQ: FISV), the leading global provider of financial services technology solutions, today announced the release of AdvisorVision 7.5, an enhanced financial planning solution that monitors financial plans and automatically alerts advisors on important changes to their clients' financial situation. This enhancement of AdvisorVision formerly from AdviceAmerica, which was acquired by Fiserv in June 2010, enables financial planners to easily access their client data information through a dashboard on the web or via a mobile device such as an iPad or a smartphone.

With advanced alert and monitoring capabilities, AdvisorVision helps advisors strengthen and build ongoing relationships with their clients, and provide responsive service from remote locations. Using a rule-based advice engine, the solution can monitor a financial plan's progress against set goals and adjust portfolios to better meet clients' goals. Users may now set up email alerts based on more than a dozen criteria including date, age, portfolio or net worth changes

Using the new advisor dashboard, advisors can get a snapshot of client information on a single web page for managing the client relationship. Via the AdvisorVision Client Access feature, the dashboard also provides a consumer-oriented display of a client's financial information and goals.

"Until now, updating a financial plan has been a very difficult and time consuming task for advisors. The newest release of AdvisorVision makes it easy for advisors to conveniently track performance and progress of the plan," said Purna Pareek, senior vice president, Financial Advice Management at Fiserv. "We enhanced our product to better meet the changing needs of financial advisors by giving them the technology that enables them to maintain and strengthen relationships with their clients, even when they are out of the office. This is yet another example of our commitment to leveraging technology that provides a 360 degree view of client data and that affords financial advisors the best tools possible to provide robust and timely advice and the most responsive service to clients."

For more information on AdvisorVision 7.5, please visit <http://www.adviceamerica.com>

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