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Fiserv Launches Innovative Retirement Planning Solution

- | Newest front-office solution from Fiserv, Retirement Illustrator, is now available
- | Retirement Illustrator provides a powerful way for financial professionals to include annuities, life insurance and long-term care insurance in retirement planning discussions
- | This solution enriches the front-office component and further advances the Fiserv convergence strategy to provide integrated front-to-back technology solutions for the wealth management industry

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, today unveiled Retirement Illustrator, an interactive and collaborative retirement income planning tool. Retirement Illustrator from Fiserv helps advisors present retirement spending requirements and distribution alternatives, overlaying risk events such as withdrawal, longevity, survivor needs and healthcare risks to ensure their clients' greatest concerns are addressed throughout their planning and retirement phases.

Retirement Illustrator provides financial professionals with the ability to forecast varying market conditions and the impact financial products can have on an investor's retirement outlook — a powerful sales illustration tool in today's volatile market. A highly graphical analysis can be generated with clients face-to-face or collaboratively by phone. An unlimited number of scenarios can be created at the touch of a button, giving advisors a robust and unique way to display side-by-side comparisons of how different product solutions, life expectancies and an array of life choices can affect retirement income.

"Our commitment to continual innovation of technology solutions to meet the rapidly evolving needs of our clients is reflected in the creation of Retirement Illustrator," said Cheryl Nash, president, Investment Services, Fiserv. "Retirement Illustrator boasts support for the front-office component of the Fiserv convergence strategy. The underlying technology of the solution gives financial professionals a powerful way to illustrate real-life scenarios and the impact on an investor's retirement plan in a simple, easy to understand manner."

"Retirement Illustrator uses Monte Carlo technology to offer simulations of retirement plans in favorable and unfavorable market conditions. The solution answers investors' most important questions, like 'What If I retire earlier or later?', 'What if I allocate less money or more money' or 'What If I die before my spouse?', all illustrated with intuitive, graphical demonstrations," said Nash.

A highly scalable, enterprise-class, web-based application, Retirement Illustrator is hosted by one of the highly secure, SAS 70 compliant data centers from Fiserv.

Fiserv has more than 3.6 million accounts on its wealth management platform and over one million UMA sleeves. With its acquisitions of AdviceAmerica financial planning technology and CashEdge data aggregation capabilities, Fiserv remains the leader in the financial services industry with technology that can support all functions of a wealth management business.

About Fiserv

Fiserv, Inc. (NASDAQ: FISV) is a leading global technology provider serving the financial services industry. Fiserv is driving innovation in payments, processing services, risk and compliance, customer and channel management, and business insights and optimization. For six of the past eight years, Fiserv ranked No. 1 on the FinTech 100, an annual international listing of the top technology providers to the financial services industry. For more information, visit www.fiserv.com.

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Media Relations:

Julie Nixon
Senior PR Manager
Fiserv, Inc.

+1 678-375-3744

julie.nixon@fiserv.com

or

Additional Contact:

Wade Coleman

Director, Public Relations

Fiserv, Inc.

+1 678-375-1210

wade.coleman@fiserv.com

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