



## Unified Wealth Platform from Fiserv Awarded "Best-in-Class" Recognition in Advisor Desktop Technology Analysis Report

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- Unified Wealth Platform recognized for advanced desktop functionality, integration, workflow and advisor experience by CEB TowerGroup
- Technology Assessment evaluated providers on critical product attributes serving wealth management advisors
- Advisor desktop solutions are the top technology investment for wealth management firms in 2013, according to report

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, announced today that [CEB TowerGroup](#), an independent research group, ranked the Unified Wealth Platform from Fiserv "Best-in-Class" for desktop components, integration, workflow and advisor experience in its recent Advisor Desktop Technology Analysis Report.

The Advisor Desktop Technology Analysis Report from CEB TowerGroup rated vendors on its proprietary five-point rating score based on 24 attributes that define "Best-in-Class" advisor desktop technology. The "Best-in-Class" integration and workflow rankings of the Unified Wealth Platform from Fiserv highlight its ability to allow advisors to automate their workflow while supporting interoperability across systems and channels.

"Advisor desktop technology yields high value and will be a top area of investment for wealth management firms in the next 12 months and beyond," said Darrin Courtney, research director, CEB TowerGroup. "Breaking down technology siloes allows advisors to leverage integrated platforms to better serve their clients. A single advisor desktop would significantly increase advisor productivity. Technology providers such as Fiserv are moving in the right direction with end-to-end solutions."

According to the CEB TowerGroup report, advisors use such solutions most frequently for tasks that are more involved and have highest client exposure, which include portfolio management, performance measurement and client reporting. The Unified Wealth Platform was specifically recognized for its top-of-the-line portfolio management and financial planning capabilities, in addition to its extensive management reporting options and user configurable business rules. A distinguishing feature of the Fiserv solution is its ability to incorporate many third-party systems, such as client relationship management (CRM) and document management, which are not standard in all desktop offerings.

The report also indicated that many institutions are in need of newer advisor desktop functionalities. Using input gained from a survey of wealth management firms, CEB TowerGroup also determined that nearly half of all surveyed firms rely on solutions that are more than seven years old. For example, widespread advances in mobile productivity — gained through smartphone and tablet based applications — remain largely unavailable to advisors, as clients increasingly demand access to such technology. This changing landscape will drive decision-making processes as firms acquire new wealth management solutions.

"Fiserv continues to support the industry's vision for a holistic advisor desktop and unified wealth management platform. The CEB TowerGroup report further validates our strategy to converge the front-, middle- and back-office to deliver a unified solution," said Cheryl Nash, president, Investment Services, Fiserv. "With a seamless user experience to drive advisor efficiency, we at Fiserv are confident that our Unified Wealth Platform will significantly enhance the advisor's total book of business by enabling holistic, household financial advice."

Unified Wealth Platform from Fiserv represents the integration of its front-, middle- and back-office wealth management technology through three main components of the platform: Financial Advice Management (front), Portfolio Management & Trading (middle) and Performance & Investor Reporting (back). The platform can be leveraged in total by large enterprises — with multiple business lines, functions and users — or configured and deployed as individual technology components for focused business needs.

Fiserv has more than 4.2 million accounts on its wealth management platforms and over 1.3 million UMA sleeves. With the acquisitions of AdviceAmerica financial planning technology and CashEdge data aggregation capabilities, Fiserv has extended its leadership position with technology that can support all functions of a wealth management business with a truly integrated, end-to-end solution.

**To read the full report please visit:** <http://www.executiveboard.com/towergroup-blog/upgrading-the-advisor-desktop-act-now-or-wait-for-more-mobility-options/>

### Additional Resources:

- Unified Wealth Platform - <http://www.fiserv.com/industries/wealth-management-solutions/unified-wealth-platform.htm>
- CEB TowerGroup - <http://www.executiveboard.com/exbd/financial-services/tower-group/index.page>

### About Fiserv

Fiserv, Inc. (NASDAQ: FISV) is a leading global technology provider serving the financial services industry, driving innovation in payments, processing services, risk and compliance, customer and channel management, and business insights and optimization. For more information, visit [www.fiserv.com](http://www.fiserv.com).

## Technology Assessment Disclaimer

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