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## **Fiserv and Lincoln Financial Group Partner to Deliver Innovative Retirement Income Technology**

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, today announced that Lincoln Financial Group is the first client to utilize its new retirement income technology, Retirement Illustrator. Lincoln will deploy the solution as *Retirement Income Illustrator* to support an enhanced participant experience in its Retirement Plan Services business as well as to offer it to Lincoln-affiliated advisors. Fiserv worked closely with Lincoln in the planning, development and launch of these new capabilities.

The Fiserv technology provides Lincoln's financial professionals with new analytical capabilities designed to help improve and better assess an investor's retirement income outlook. The dynamic capabilities allow clients to visualize different savings and investment strategies that can better help them improve cash-flow at the time of retirement. Monte Carlo simulations demonstrate retirement plans in favorable and unfavorable market conditions, allowing financial professionals to plan best and worst case scenarios, and helping investors visualize how market volatility can affect their retirement picture through interactive, intuitive and graphical illustrations.

"As the industry leader in wealth management, we are committed to providing financial professionals with tools to help them give unmatched service to their investors," said Cheryl Nash, president, Investment Services, Fiserv. "We partnered with our longstanding client Lincoln Financial to create a technology solution that will help financial professionals present retirement income analyses to their clients in a flexible, easy-to-understand format."

"Lincoln is committed to helping clients achieve better retirement outcomes and the new *Retirement Income Illustrator* provides a flexible solution that can be deployed enterprise-wide to help us meet this objective," said Ken Solon, Head of Shared Services and Information Technology for Lincoln Financial Group. "The technology also allows our financial professionals to offer compelling retirement income counsel to their clients."

The new retirement income capabilities deployed by Lincoln as *Retirement Income Illustrator* are designed to help advisors present retirement spending requirements and distribution alternatives, overlaying risk events such as withdrawal, longevity, survivor needs and healthcare risks to ensure investors' greatest challenges are met throughout their planning and retirement phases. The retirement income capabilities can be easily adapted to different practice models. [Retirement Illustrator](#) from Fiserv can be deployed across an enterprise or purchased as individual licenses by financial professionals.

Fiserv has more than 3.7 million accounts on its Unified Wealth Platform 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.

### **About Lincoln Financial Group**

Lincoln Financial Group is the marketing name for Lincoln National Corporation (NYSE:LNC) and its affiliates. With headquarters in the Philadelphia region, the companies of Lincoln Financial Group had assets under management of \$174 billion as of September 30, 2012. Through its affiliated companies, Lincoln Financial Group offers: employer-sponsored retirement plans; individual annuities and life insurance, group life, disability and dental insurance; and comprehensive financial planning and advisory services. For more information, including a copy of our most recent SEC reports containing our balance sheets, please visit [www.LincolnFinancial.com](http://www.LincolnFinancial.com).

### **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).

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