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## **Money Management Institute Panel Hosted by Fiserv Discussed Transformative Retirement, Regulatory, Strategic and Technological Trends**

**Brookfield, Wis., November 17, 2010** - [Fiserv, Inc.](#) (NASDAQ: FISV), the leading global provider of financial services technology solutions, hosted an industry panel and luncheon on November 11, 2010, as part of the Money Management Institute's (MMI) Annual Fall 2010 Solutions Conference in New York City. Panelists discussed the transformative trends that are currently affecting retirement, the financial planning industry, and what advisors need to do to succeed in the rapidly evolving regulatory and economic landscape.

Panelists included:

- | Bobby Greenburg, Head of Strategic Insights and Valued Added Services Marketing for Lincoln Financial Group
- | Scott Gottlieb, Leading Industry Consultant and member of RegEd's Advisory Board
- | Dan McNamara, President of the Investment Management Company for USAA

Panel topics included:

- | Trends in retirement and meeting the needs of the Baby Boomer generation
- | Creating a culture of compliance while maintaining business growth objectives
- | The new advice model and goal-based financial planning

"With all of the changes in the industry and business models over the past year, bringing together a pre-eminent panel of experts gave us an opportunity to discuss the trends and topics that are on everyone's minds," said Cheryl Nash, senior vice president of business development and marketing, Fiserv, and moderator of the panel.

In 2010, Fiserv was awarded Money Management Institute's prestigious title of "Service Provider of the Year." Fiserv is the leading technology provider for the managed accounts industry: its APLSM platform processes more than 3.4 million accounts daily, and it is the chosen technology provider for more than 1 million UMA sleeves and over \$1.8 trillion in assets.

**About Fiserv** Fiserv, Inc. (NASDAQ: FISV) is the leading global provider of information management and electronic commerce systems for the financial services industry, driving innovation that transforms experiences for financial institutions and their customers. Fiserv is ranked No. 1 on the FinTech 100 survey of top technology partners to the financial services industry. For more information, visit [www.fiserv.com](http://www.fiserv.com).

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