

### Expanded Asset Coverage for Portfolio Diversification in Managed Accounts

#### Hedge-fund strategies through Unified Wealth Platform from Fiserv

Fiserv is driving innovation in Payments, Processing Services, Risk & Compliance, Customer & Channel Management and Insights & Optimization, and leading the transformation of financial services technology to help our clients change the way financial services are delivered. Visit [www.fiserv.com](http://www.fiserv.com) for a look at what's next now.

Over the past five years, the managed account industry has recorded triple-digit asset growth driven by investors. This surge has increased the appetite for further portfolio diversification with advisors searching to access a greater number of investment strategies for their clients. The opportunity for investors to capitalize on alternative strategies integrated within their managed account portfolios is enormously appealing.

For advisors, the ability to add alternative hedge-fund strategies as a component of the portfolio mix for their high-net-worth (HNW) investors combined with the assurance of seamless single platform efficiency and automation is compelling. Alternative hedge funds are in high demand, due to their lower correlation to traditional asset classes.

Fiserv provides integrated access to hedge fund strategies through HedgeACT via managed account sleeves on Unified Wealth Platform. Through Unified Wealth Platform, investors can access HedgeACT's extensive database of credit, hedge and commodity/futures fund strategies. Client firms can access hedge funds and deliver hedge fund research, modeling, investing and reporting.

#### The Path to Diversification

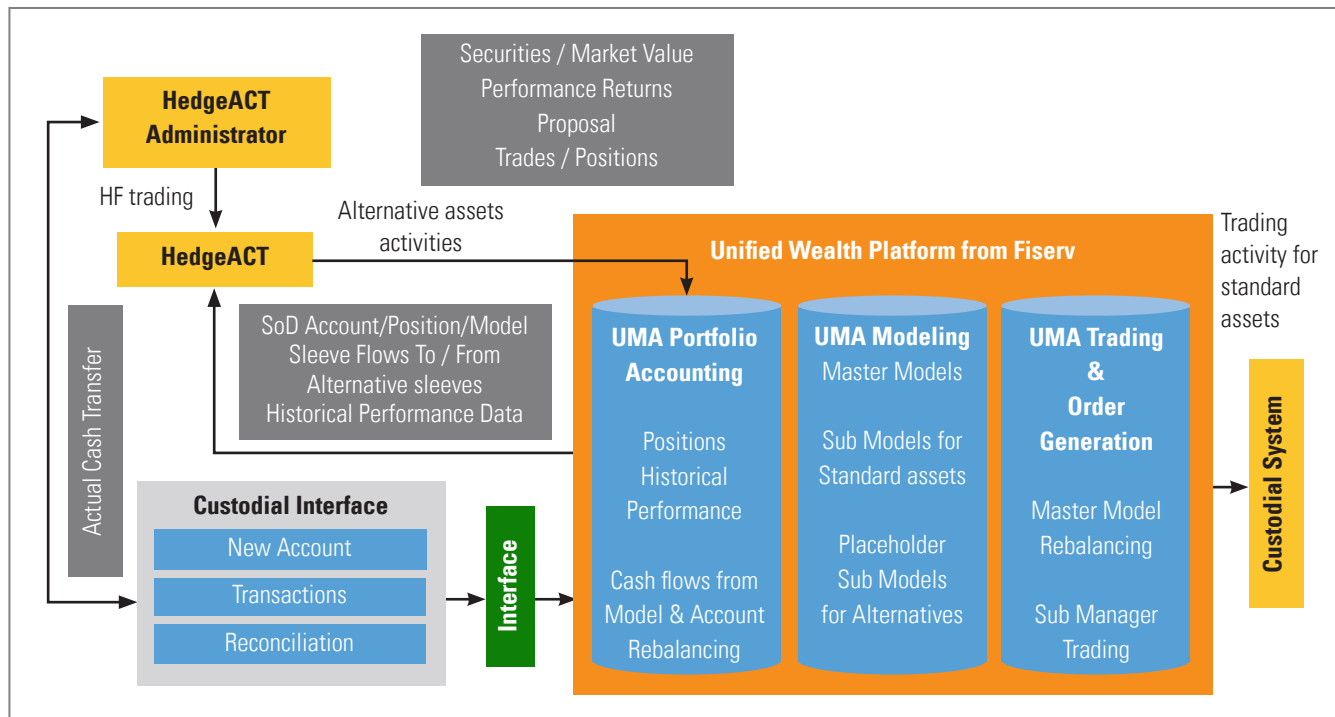
This encourages portfolio diversification: managed-account sleeves on Unified Wealth Platform provide the structure for advisors to include both alternative and traditional investments within a single account. With HedgeACT integration, Unified Wealth Platform allows qualified investors to access hedge funds at lower managed-account investment minimums (typically \$100,000).

Unified Wealth Platform has a highly-configurable user interface and dashboard, which enables seamless workflow navigation and integrated support of all discretionary managed account programs (MFA, RPM, SMA, UMA). Large enterprises can leverage Unified Wealth Platform to integrate front-, middle-, and back-office wealth management technology – increasing automation, data aggregation and end-to-end straight-through processing.

#### Goal-Oriented Investing Made Easy

Investors are looking for a combination of Outcome-Based Investing (OBI) and Goals-Based Investing strategies to achieve desired investment objectives while taking into consideration life goals and risk thresholds. With a single managed-account portfolio, the need to open and manage multiple accounts to meet these

## Accessing Hedge Funds Through Unified Wealth Platform.



objectives is no longer required, thereby simplifying the operational process, providing full visibility and opening the door for asset allocation that can now include low-correlated alternative hedge-fund strategies.

Fiserv delivers a seamless and transparent hedge fund investing process directly through Unified Wealth Platform. With integration to HedgeACT, you can encourage portfolio diversification, deliver efficiency with automation and better serve investors.

### Connect With Us

For more information about hedge fund strategies through Unified Wealth Platform, call 800-872-7882, email [getsolutions@fiserv.com](mailto:getsolutions@fiserv.com) or visit [www.fiserv.com](http://www.fiserv.com).



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