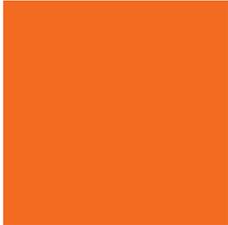


Product



Data Services

Handle Managed Account Businesses in a More Efficient and Scalable Manner



Data Services from Fiserv, available through Wealth Management Network, offers a real-time, single point of entry into account data, life cycle, and analytics that enables firms to handle their managed account business in a more efficient and scalable manner. Further, it delivers the insight and opportunity to rapidly implement new connections between business partners.

Financial institutions, wealth management firms, financial advisors, investors and market utilities rely on Data Services, which includes: data access, aggregation and analytics/visualization.

Data Services benefits organizations in a number of ways:

- **Ability to monetize aggregation:** Balance and transaction alerts help financial institutions attract new deposits, cross-sell services and increase retention. Opportunity alerts help advisors attract new assets and offer advice on held-away assets
- **Superior data quality:** Clients benefit from data accuracy, completeness and coverage in order to deliver solutions that help monetize account aggregation
- **Ease of integration:** Flexible deployment and integration options give financial services companies control over the user experience with minimal effort

- **Superior support:** Proactive monitoring and issue resolution, combined with a performance dashboard and SLA reports, ensure clients have a complete understanding of service performance

Data Aggregation

Our data aggregation capabilities are easy to integrate to support any applications requiring held-away data. This provides financial services companies and their clients with greater financial insight, enabling better informed decisions. With increased insight, relationships are strengthened, providing opportunities to generate additional revenue. Fiserv data aggregation capabilities support a variety of applications, including:

- Advisor-directed financial planning
- Self-directed financial planning

Data aggregation consolidates, normalizes and enriches account data to provide end users with a comprehensive portfolio view of assets held within their financial accounts.

Our network uses a sophisticated, scalable, flexible and highly secure process to create a holistic view of a client's financial picture. This provides advisors the opportunity to align their client's entire portfolio with their goals and risk tolerances. Advisors are able to create opportunities for new investment models in their effort to balance portfolios.



Fiserv is driving innovation in Payments, Processing Services, Risk & Compliance, Customer & Channel Management and Insights & Optimization. Our solutions help clients deliver financial services at the speed of life to enhance the way people live and work today. Visit fiserv.com to learn more.

Data aggregation goes beyond cleansing and normalization to supply enhanced, value-added actionable data that can be used directly by financial institutions or through partner solutions designed for:

- Planning
- Proposals
- Rebalancing

Data Analytics

Fiserv data analytics, combined with data visualization techniques, improve the ability of clients to identify trends in a vivid, graphical context and can allow them to see and grasp important connections and identify new opportunities.

Fiserv sees an important opportunity for asset managers and broker-dealers to curate or selectively organize and display important data views in easier, more accessible and meaningful ways to help achieve greater insight and understanding. Data analytics and visualization techniques help clients identify and track key performance indicators, monitoring the effectiveness of products, strategies and resources.

To stay competitive, firms will need immediate access to data that can be analyzed in easy-to-digest and useful formats. Our data analytics and data visualization techniques help clients enhance functionality and increase insight through useful and easy-to-use data groupings and drilldowns. This allows managers, sponsors and sales organizations to more effectively explore and understand their data and quickly grasp its significance to make critical business decisions.

Connect With Us

For more information about Data Services, call us at 800-872-7882, email getsolutions@fiserv.com or visit www.fiserv.com.



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