Transforming wealth management technology to support the needs of clients, advisors and the home office.

Manage risk, drive efficiency and reduce cost — all with the right partner.

Addressing Your Business Priorities

- Accelerate digitalization
- Enhance the user experience
- Support advisor growth
- Meet regulatory and compliance needs
- Reduce total cost of ownership

Your Solution – Powered by Fiserv

Whether you require a specific solution such as proposal generation or configurable performance reporting, or an end-to-end technology platform,we can integrate your choice and mix of solutions so they perform as one streamlined ecosystem.

Your Choice and Mix of solutions Integrated as one streamlined ecosystem.

Proven

Scalable

Flexible

Secure

Technology Solutions for Wealth Management

Drive growth and efficiency to stay in step with the way people live and work today.

fiserv.

Solutions for the full wealth management life cycle

Financial Planning
Best-in-class suite of comprehensive and goals-based financial planning technology and tools that are flexible and easy to use

Digital Advice
Innovative digital advice tools, including robo-advice and investor portals with frictionless account opening that can be integrated into your core platform

Advisor Dashboard
Snapshot of advisor's book of business with access to managed product research, proposal generation and workflow integration to optimize client onboarding and servicing

Portfolio Management and Trading
Portfolio accounting and decision support tools for fee-based assets enabling active portfolio management, trading and rebalancing across multiple managed account programs

Rep-Driven Programs
Advanced web-based solutions that support rep as advisor and rep as portfolio manager programs, allowing the advisor or home office to create, maintain, manage and communicate on an unlimited number of model portfolios

Home Office Tools and Oversight
Oversight tools and guardrails to successfully manage programs directed by the home office as well as those driven by financial advisors and third-party managers

Performance and Investor Reporting
Highly customizable and compelling client-facing reports powered by seamless data integration and an extensive report template library

Billing Services
Comprehensive client billing and revenue management solution that helps your firm support fast-changing fee structures with efficient and controlled invoicing

Connect With Us

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

fiserv.