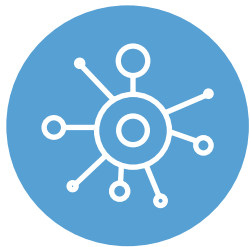


Wealth Management Network from Fiserv

Connectivity powered by the largest, most robust wealth management network in the industry, connecting sponsors, managers, custodians and third parties

Addressing Your Business Priorities



Accelerate
Digitalization



Reduce Total Cost
of Ownership



Create Operational
Efficiency



Support Advisor
Growth



Enhance the
User Experience

Wealth Gateway

- Model communication
- Custody and clearing files
- Order routing
- Messaging ordering, FIX platform
- Data services
- APIs

Wealth Management Network

Connectivity + Capabilities + Integration

Innovative Solutions

- Digital advice
- Education and digital content
- Digital 401(k) TAMP
- Business process outsourcing






Technology Solutions for Wealth Management

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

fiserv.

Wealth Management Network from Fiserv

Key Benefits

	Accelerates Digitalization The largest wealth network connecting the industry. White-labeled solutions to accelerate a digital strategy.		Reduces Cost of Ownership Standardized platform and real-time connectivity to reduce costs and improve efficiency.		Creates Efficiency Unmatched scalability to drive cost efficiency and improve end-to-end workflow. Increased automation and optimization.
	Supports Advisor Growth Digital tools and automation for greater efficiency and better client experience.		Enhances the User Experience Intuitive interface and simplified access. Modern digital experience that reflects how people live and work.		

Features of Wealth Management Network

- **Model Communication and Distribution** – Refine your model distribution strategy and streamline the workflow process with a single point of entry for communicating with multiple managed account sponsors
- **Digital Advice and Education** – Employ white-label digital investment advice solutions to support a single platform strategy. Access innovative, automated advice technology with a modern, front-end user experience to elevate the digital experience for all users
- **Digital 401(k) TAMP** – Provide your RIAs with a white-labelled 401(k) and retirement plan platform that puts clients' best interests first. Make implementing retirement plan solutions easier for your financial advisors
- **Business Process Outsourcing** – Contract with Fiserv for processing and consulting services, including reconciliation, trading support, process rationalization and staff augmentation

Connect With Us

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

