

# Unified Managed Accounts

Fiserv can help your firm create an account for life

Engage Fiserv to configure a unified managed account (UMA) program with the flexibility needed to support your firm's unique business model.

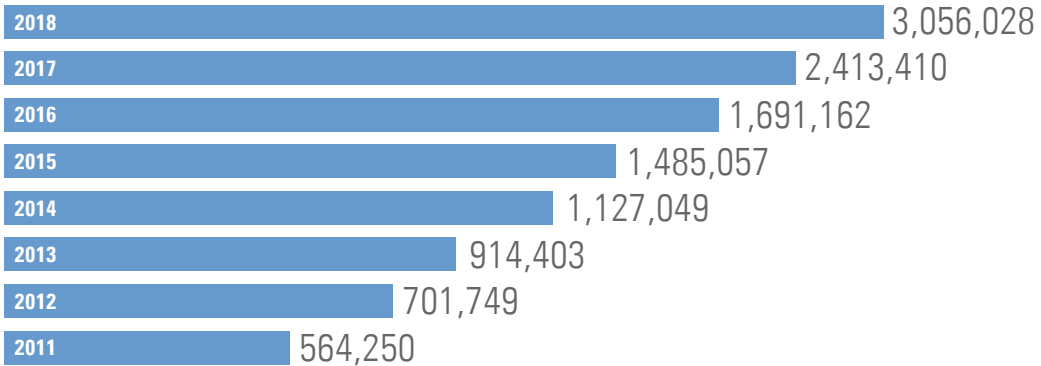
## Fiserv at a glance

Over  
**35**  
years in  
the industry

Serving  
**7**  
of the top 10  
broker-dealers

More than  
**\$2.2**  
trillion in  
platform assets

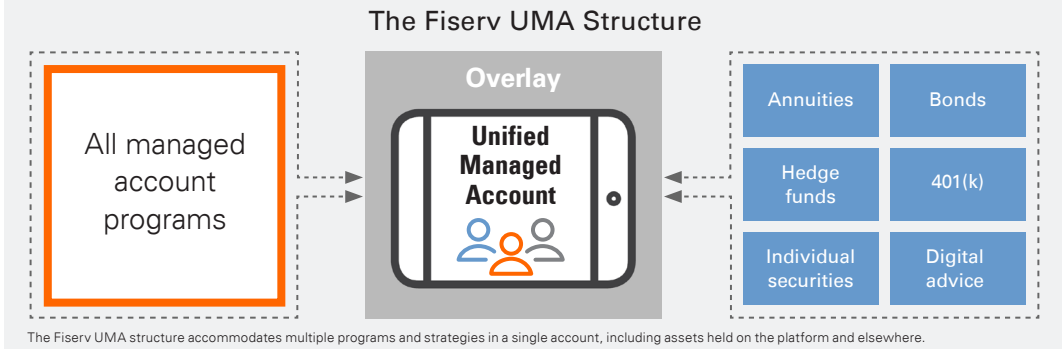
## UMA account growth



**Over 5.4X** UMAs have grown more than fivefold from 2011–2018, demonstrating the popularity of the platform.

UMAs are becoming the platform of choice for a wide range of managed account distributors including banks, large regional broker-dealers and wire houses.

## Partner with a pioneer in UMA technology



**\$992.5**  
Billions

**26.8%**  
CAGR

## A look at UMA programs

UMA accounts have increasingly grown in popularity and represent the second fastest growing managed account program behind RPM/RPA. As of the end of 2018, UMA assets totaled \$992.5 billion, sustaining a 5-year compound annual growth rate (CAGR) of 26.8 percent.

Sources: Cerulli Lodestar Total Number of Accounts by Program Type, Cerulli Associates, 2011–2018. Cerulli Lodestar Asset and Growth Rates by Program Type, Cerulli Associates, 2009–2018. The Cerulli Report U.S. Managed Accounts, Cerulli Associates, 2018

**Connect With Us:** For more information about Unified Wealth Platform, call 800-872-7882, email [getsolutions@fiserv.com](mailto:getsolutions@fiserv.com) or visit at [www.fiserv.com](http://www.fiserv.com).