



Press Release

For more information contact:

Media Relations:

Julie Smith
Senior Public Relations Manager
Fiserv, Inc.
412-225-3182
julie.smith@fiserv.com

Additional Contact:

Ann Cave
Director, Public Relations
Fiserv, Inc.
678-375-4039
ann.cave@fiserv.com

For Immediate Release

Fiserv Partners with InvestEdge to Expand Reporting Capabilities for the Wealth Management Industry

- Fiserv continues to integrate best-of-breed technology solutions into its Unified Wealth Platform to facilitate the delivery of financial services at the speed of life
- InvestEdge delivers award-winning data management, analytics and reporting solutions to investment advisory firms
- Partnership allows Fiserv to deliver extensive report customization and investor portals to firms who run their managed account business on its Unified Wealth Platform

BROOKFIELD, Wis., October 21, 2015 – [Fiserv, Inc.](http://www.fiserv.com) (NASDAQ: FISV), a leading global provider of financial services technology solutions, announced today it has partnered with InvestEdge, based in Bala Cynwyd, Pennsylvania, to deliver access to an array of data management and customized reporting solutions to advisory firms and investors that run managed account portfolios on the Unified Wealth Platform from Fiserv. The Unified Wealth Platform will seamlessly integrate InvestEdge capabilities to enable a real-time display of client account data on the platform, customized reports and access to an intuitive investor portal.

“There has been an increasing demand from our clients for new technology solutions that can keep pace with investor demand for greater transparency and frequency of account data and performance,” said Cheryl Nash, president, Investment Services, Fiserv. “Wealth advisors must have easy and immediate access to information about their customers to provide advice at the point of thought, and our partnership with InvestEdge makes this possible.”

The partnership will enhance reporting capabilities for Fiserv clients by offering a robust suite of over 40 fully customizable report options. In addition, the investor portal will allow advisors to better interact with their clients via new messaging and e-statement report delivery.



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“Wealth advisors have been entrusted with their client’s wealth, and reporting highlights the value that advisors create, enabling them to maintain long term relationships with their clients,” said Bob Stewart, Chief Executive Officer and founder of InvestEdge. “Our partnership with Fiserv adds true value to the advisor-client relationship. The vast amount of Fiserv client data, combined with the full suite of InvestEdge customizable reporting solutions, creates a tremendous opportunity for wealth managers to elevate their brand, increase efficiency and better serve their investors.”

InvestEdge provides investment firms with wealth management technology solutions such as management, measurement and reporting of assets that allow broker-dealers and money managers to grow their business and enhance the client experience. InvestEdge is the recipient of two industry awards in 2015 from [Family Wealth Report](#) and [PAM Magazine](#).

Fiserv is a market leader providing innovative investment services solutions with more than four million managed accounts supported on its Unified Wealth Platform. The Unified Wealth Platform is tailored for wealth management firms with 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 the Unified Wealth Platform to integrate front, middle, and back-office wealth management technology, while increasing automation, straight-through processing and end-to-end workflow.

The Fiserv partnership with InvestEdge comes on the heels of its agreement with [HedgeACT](#). By integrating industry best-of-breed technology into its Unified Wealth Platform, Fiserv continues to expand its expertise and commitment to provide comprehensive, end-to-end solutions to the wealth management industry.

In a world that is moving faster than ever before, Fiserv helps clients deliver solutions that are in step with the way people live and work today – financial services at the speed of life. Learn more at [TheSpeedofLife.com](#).

Additional Resources:

- Unified Wealth Platform from Fiserv – <http://fisv.co/1PkvOaC>
- Fiserv Partners with HedgeACT to Provide Access to Hedge Funds in Managed Accounts – <http://newsroom.fiserv.com/releasedetail.cfm?ReleaseID=891471>

About InvestEdge

InvestEdge is a leading provider of innovative advisor solutions to banks, registered investment advisors, family offices, and brokerage firms. Through an integrated wealth management platform, InvestEdge automates key front-office functions including portfolio management, performance measurement, client communications and reporting,



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compliance monitoring, trade automation, data aggregation, and client portal solutions. For more information, visit www.investedge.com.

About Fiserv

Fiserv, Inc. (NASDAQ: FISV) is a leader in financial services technology and one of FORTUNE® magazine's World's Most Admired Companies. Fiserv enables clients to achieve best-in-class results by driving quality and innovation in payments, processing services, risk and compliance, customer and channel management, and business insights and optimization. For more information, visit www.fiserv.com.

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