



AdvisorVision from Fiserv Awarded Best-in-Class Recognition in Financial Planning Technology

- [CEB TowerGroup](#) Technology Assessment ranked providers on critical product attributes
- AdvisorVision was honored for client engagement, advisor experience, advisory tools and enterprise support
- The solution is one of the largest web-based financial planning platforms in the market place with more than 500,000 client plans on the system

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, announced today that CEB TowerGroup, a research and advisory services firm, has ranked AdvisorVision™ best-in-class in its recent Financial Planning Technology Vendor Landscape Report. AdvisorVision was named top of the line for client engagement, advisor experience, advisory tools and enterprise support.

CEB TowerGroup rated top performers on its proprietary five point rating score based on 24 attributes that define "best-in-class" financial planning technology. AdvisorVision was recognized for its configurability at the enterprise and advisor level, vendor integration and multitude of client-engaging tools.

"As financial service executives evaluate new IT products to support their business needs, many are overwhelmed by the volume of technologies available," said Aaron Kissel, executive director, CEB TowerGroup. "CEB TowerGroup is the only advisory group qualified to evaluate such a broad range of financial services technology tools and to help financial institutions navigate the increasingly complex landscape."

"This represents another important milestone in the Fiserv strategy to converge technologies, which includes integration of front-, middle- and back-office technology and data aggregation to deliver Unified Managed Household (UMH) capabilities," said Cheryl Nash, president, Investment Services, Fiserv. "Additionally, the valuable feedback from this report and other financial research firms will help Fiserv continue to enhance our front-office technology offering, particularly focusing on comprehensive cash flow, tax and estate planning."

Fiserv and CEB TowerGroup will co-host a webinar on Tuesday, May 1, 2012 at 1:00 p.m. (EDT). Darrin Courtney, research analyst, CEB TowerGroup and Jeremy Schlarb, business solutions analyst, Fiserv will share insights on how to grow business with evolving financial planning technology.

Fiserv offers a range of solutions for advisors, including Retirement Illustrator, a unique risk management and annuity illustration tool and Proposal Generation Manager, a portfolio construction and investment sales solution. Fiserv also remains the leading technology provider for the Managed Accounts industry with its integrated managed account solution, which moves all programs onto one, unified platform (UMA, SMA and MFA). Fiserv has more than 3.7 million accounts on its Wealth Management Platform and over one million UMA sleeves. With its acquisitions of AdviceAmerica financial planning technology and CashEdge data aggregation capabilities, Fiserv remains the leader in the financial services industry with technology that can support all functions of a wealth management business, from planning, trading, post-trade processing and investor reporting to fee billing and invoicing.

Additional Resources:

- AdvisorVision - <http://www.advisorvision.com>
- TowerGroup - <http://www.executiveboard.com/financial-services/tower-group/>
- Sign up for Free Webinar - events.signup4.com/TGWebinar

About Fiserv

Fiserv, Inc. (NASDAQ: FISV) is a leading global technology provider serving the financial services industry. Fiserv is driving innovation in payments, processing services, risk and compliance, customer and channel management, and business insights and optimization. For six of the past eight years, Fiserv ranked No. 1 on the FinTech 100, an annual international listing of the top technology providers to the financial services industry. For more information, visit www.fiserv.com.

Technology Assessment Disclaimer

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FISV-G

Media Relations:

Julie Nixon

Senior PR Manager

Fiserv, Inc.

+1 678-375-3744

julie.nixon@fiserv.com

or

Additional Contact:

Wade Coleman

Director, Public Relations

Fiserv, Inc.

+1 678-375-1210

wade.coleman@fiserv.com

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