



News Release

FIS Enhances Wealth Management Offerings with Advanced Digital Advice Solution

- Key facts**
- Solution leverages robo-advisory and automation technology from Trizic to enhance financial planning and advice services
 - Enables financial institutions and advisors to more effectively manage mass affluent clients and attract tech-savvy millennials

JACKSONVILLE, Fla., -- June 8, 2017 -- FIS™ (NYSE: FIS), a global leader in financial services technology, has enhanced its end-to-end suite of wealth management offerings with an advanced digital advice solution designed to help financial institutions and wealth advisors better serve their customers, grow their business, and improve profitability.

The new solution uses robo-advisory and automation technology from Trizic to enable FIS clients to more cost-effectively manage smaller-balance accounts, attract tech-savvy millennials, and serve high net worth clients looking for access to sophisticated investment models through digital advice.

Offered as part of the FIS' wealth management platform, the digital advice solution automates the full advisor workflow from onboarding and risk tolerance to portfolio construction, reporting and billing. The digital advice solution also provides financial institutions without a wealth division an opportunity to drive new revenue with a complete digital advice solution. Firms can select a technology-only option that can be integrated with existing systems and workflows or a complete robo-advisory solution including model management and custody from FIS.

"As our clients look for new ways to better service investors and help them achieve their financial goals, while profitably growing their business, the ability to offer capabilities at all points across the wealth continuum is essential," said Mike Rogalski, head of Wealth and Retirement for FIS. "Extending FIS' wealth platform to include turnkey digital advice allows financial institutions to cost-effectively deliver robust, high-quality wealth advisory services to nearly any customer."

"Wealth managers are looking for new ways to use technology to grow their business and better attract and serve a full range of clients," commented Trizic CEO Drew Sievers. "We look forward to working with FIS, a leader in providing integrated solutions to the wealth industry, to offer this breakthrough digital capability to their clients."

The digital advice solution is multi-custodial and integrates with FIS trust and core systems, making it easy for financial institution to convert smaller balance accounts into fully managed accounts as balances grow. The robo-advisory capability can run independently or as part of an advisor-supported solution, depending upon the firm's needs.

"Wealth managers at every type of institution are struggling to attract the lower balance emerging wealth from Millennials," said Will Trout, senior analyst, Celent. "Existing people-powered solutions are great for higher-end clients, but some form of automation is required to cost-effectively service these smaller balance accounts."

ABOUT FIS - FIS is a global leader in financial services technology, with a focus on retail and institutional banking, payments, asset and wealth management, risk and compliance, consulting, and outsourcing solutions. Through the depth and breadth of our solutions portfolio, global capabilities and domain expertise, FIS serves more than 20,000 clients in over 130 countries. Headquartered in Jacksonville, Fla., FIS employs more than 57,000 people worldwide and holds leadership positions in payment processing, financial software and banking solutions. Providing software, services and outsourcing of the technology that empowers the financial world, FIS is a Fortune 500 company and is a member of Standard & Poor's 500® Index. For more information about FIS, visit www.fisglobal.com.

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