



*The* INSTITUTE *for*  
WEALTH MANAGEMENT

**FOR IMMEDIATE RELEASE**

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**FISERV INVESTMENT SUPPORT SERVICES OFFERS PROFESSIONALLY  
MANAGED ETF SOLUTIONS FOR THIRD PARTY ADMINISTRATORS**

DENVER, CO (July 26, 2005) –Plan Sponsors and participants now have access to institutional managers and active, professional money management when investing in ETFs through retirement plans holding assets at Fiserv Investment Support Services (Fiserv ISS).

In response to the increasing popularity of ETFs, the Institute for Wealth Management (IWM) has arranged to provide Plan Sponsors who hold plan assets at Fiserv ISS with a lower cost, professionally managed investment product to better meet participants' retirement goals. Acting as Registered Investment Advisor to the retirement plan, IWM provides a series of asset allocation models. These models use the research of several of the best-known institutional money managers in the country such as Neuberger Berman (a Lehman Brothers Company), Wilmington Trust and others. The Plan Sponsor works with IWM to choose an institutional money manager to establish specific ETF investment portfolios.

Fiserv ISS will track the assets of, and calculate a daily Net Asset Value (NAV) for, each ETF investment portfolio. The daily NAV will then be reported back into the Third Party Administrator's (TPA) participant record keeping system alongside all mutual fund NAVs for the plan. This service is scheduled to be available in the third quarter of 2005.

"ETFs are becoming an increasingly popular way to invest, and we are pleased to make available a platform through which TPAs and Recordkeepers can offer a customized ETF investment strategy for their clients at a competitive price," said Sean Gultig, vice president of the

Institutional Retirement Plan Services group (formerly TRUSTlynx) at Fiserv ISS. “This is another example of our commitment to offer our clients the best in customer service along with the products and services they need to succeed.”

IWM President Matt Medeiros said, “We are very pleased to offer our services to plans using the Fiserv ISS platform. Through this arrangement we will be providing the investment expertise of institutional money managers to the qualified plan market. By using ETFs in this structure, we will be managing the most efficient investments available. Participants will now have access to the investment management advice critical in the retirement planning process.”

Fiserv ISS offers targeted solutions for financial professionals. Fiserv ISS’ services are provided by Fiserv Affinity, Inc., or Fiserv Trust Company, member FDIC.

### **About Fiserv Investment Support Services**

Fiserv Investment Support Services provides products and services through Fiserv Affinity, Inc., and Fiserv Trust Company. Fiserv Trust Company, headquartered in Denver, is one of the nation's largest independent trust companies, including the administration of 320,000 self-directed retirement and custodial accounts valued at \$36.9 billion. The company was formed in 2004 when four of the leading independent trust companies and administrative service providers in the country, First Trust Corporation, Lincoln Trust Company, Resources Trust Company and Retirement Accounts, Inc., united as Fiserv Trust Company. Between the four predecessor companies, there are 110 years of experience in providing quality trust, custodial and back office services to the financial services industry. Fiserv Trust Company is a business unit of Fiserv, Inc. Fiserv, Inc. (Nasdaq: FISV), provides information management systems and services to the financial industry. Headquartered in Brookfield, Wisconsin, Fiserv reported 2004 processing and services revenues of \$3.4 billion. Fiserv was ranked the largest provider of information technology services in the U.S. financial services in the 2004 FinTech 100 survey by the American Banker newspaper and the Financial Insights research firm. Fiserv can be found on the Internet at [www.fiserv.com](http://www.fiserv.com).

### **About Institute for Wealth Management**

The Institute for Wealth Management provides evaluation processes and strategies needed to create a unique platform of well-known, institutional investment managers, tailored to the product and plan offerings. The Institute for Wealth Management provides access to Wall Street strategists, who use their successful modeling methodologies to provide active, tactical asset allocation. These models are then aligned with clients' individual risk profiles. The goal is to provide strong, long-term performance consistent

with individuals' investment preferences. This, we believe, leads to greater client satisfaction and, therefore, higher plan participation and persistency.

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**STYLE NOTES TO EDITORS:**

- Fiserv Investment Support Services in the headline and on second reference should be referred to as Fiserv ISS to accurately differentiate the company from its parent, Fiserv, Inc.
- TRUSTlynx – TRUST is all upper case.

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