New FIS Wealth Management Platform Brings Rich Data Insights to the Client Relationship

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Key facts

- New FIS Unity wealth management platform leverages advanced data analytics to give advisors rich insights into the financial needs of their multi-generational clients.
- FIS Unity offers a single, 360-degree picture of clients' financial assets across multiple financial providers through integrated APIs.
- The solution leverages an innovative approach to workflow that automates and streamlines processes.

JACKSONVILLE, Fla.--(BUSINESS WIRE)--Jun. 9, 2020-- As investors of all ages seek advice for weathering the current uncertain investing environment, financial technology leader FIS ™ (NYSE: FIS) today announced a leading-edge wealth management platform that gives wealth managers the data and insights they need to better understand and serve the needs of their multi-generational clients.

FIS Unity leverages open application programming interfaces (APIs) to provide wealth managers an integrated, 360-degree view of a client's financial assets across multiple financial providers. Using the system's industry-leading analytics tools and intuitive dashboards, wealth managers can gain insights into their clients' investment history, lifestyle changes and investing preferences – enabling managers to offer personalized investment recommendations that meet clients' current and future needs.

In addition, the platform makes use of advanced data analytics along with fully integrated workflows to automate and streamline processes, enhance efficiency and lower operational costs. The solution is appropriate for wealth management firms, wealth divisions of banks, trust companies, custodians and brokerage firms.

"Unprecedented levels of market volatility have made it more important than ever that wealth managers and advisors have a complete, accurate picture of their clients' assets and remain connected anytime and anywhere," said Brian DuVal, Head of Wealth and Retirement at FIS. "During this time, investors still expect accurate, insightful guidance when they need it, and the Unity solution prepares advisors with a rich, holistic view of their clients' assets."

AMG National Trust Bank chose FIS Unity to enable its advisors to provide a more personalized experience to the clients it has been serving for more than 45 years.

"We serve multiple generations of clients who all have very different expectations when it comes to investing," said Don Seacrest, SVP Operations at AMG National Trust Bank. "By modernizing our wealth management system on the FIS Unity platform, we will be better able to address those differing needs and grow those relationships."

Learn more about FIS Unity in this video or on the FIS website.

About FIS

FIS is a leading provider of technology solutions for merchants, banks and capital markets firms globally. Our more than 55,000 people are dedicated to advancing the way the world pays, banks and invests by applying our scale, deep expertise and data-driven insights. We help our clients use technology in innovative ways to solve business-critical challenges and deliver superior experiences for their customers. Headquartered in Jacksonville, Florida, FIS is a Fortune 500® company and is a member of Standard & Poor's 500® Index. To learn more, visit www.fisglobal.com. Follow FIS on Facebook, LinkedIn and Twitter (@FISGlobal).

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