



FIS and InvestCloud Partner to Deliver AI-Powered Wealth Management Tools to Financial Institutions

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Key Facts

- FIS and InvestCloud announced a long-term partnership to provide a modern wealth management solution that brings together advisor tools, client-facing digital experiences, and AI capabilities into a single connected environment.
- The new solution will deeply integrate with FIS core wealth platforms, allowing institutions to modernize the front office without replacing existing infrastructure.
- Consumers expect digital wealth experiences at the same level they get from consumer apps. With this partnership, participating institutions can now offer a connected experience spanning mobile access, secure messaging, and account aggregation, all tied directly into the advisor's journey.

JACKSONVILLE, Fla.--(BUSINESS WIRE)--May 21, 2026-- FIS® (NYSE: FIS), a global leader in financial technology, and InvestCloud, a global leader in wealth technology, today announced the launch of FIS digital wealth solutions, designed to give advisors and their clients a streamlined experience and a more complete financial picture across trust, advisory, and externally held accounts.

As financial institutions work with fragmented systems and disparate data sources, their wealth clients increasingly expect an intuitive, always-on digital experience. FIS digital wealth solutions are designed to help firms deliver interactions that are personalized, secure, and actionable. For wealth firms, that means advisors are working from a connected dashboard. For advisors, that means a system that reasons across client data, portfolio positions, compliance requirements, and transaction history - surfacing what matters, when it matters.

The new solution leverages InvestCloud's Advisor Workspace and Client Experience capabilities, which today support trillions in wealth assets worldwide, and is integrated with FIS's core processing platforms to provide a single connected environment spanning advisor tools, client-facing experiences, and AI capabilities-without requiring institutions to replace their existing infrastructure. InvestCloud's unified data model brings together client data, interactions, and portfolio activity to power agentic AI capabilities that help advisors surface timely insights and actions. The new solution is designed to help firms modernize the front office while continuing to rely on the FIS platforms that power their operations.

Leveraging FIS Code Connect, institutions can deploy FIS' digital wealth solutions without disrupting current framework. Built-in security controls, audit capabilities, and data governance features support supervision and regulatory requirements, while AI safeguards are designed to prevent client data from being stored or used to train models, helping to protect sensitive personal information.

"Financial institutions want to modernize the wealth experience without disrupting the foundation they've built," said Jim Johnson, Co-President, Banking Solutions, FIS. "With InvestCloud, we're giving clients the flexibility to deliver an intelligent front office while continuing to rely on the FIS platforms that already power their operations."

"The FIS partnership is a unique platform to expand our footprint to bring differentiated capabilities to financial institutions to help them delight their wealth clients. InvestCloud brings the digital experience and AI-enabled expertise that today's advisors and clients expect," said Jeff Yabuki, Chairman and CEO, InvestCloud. "At a time of transformative change, we are working together to deliver the personalized, high-touch service that strengthens relationships and keeps the human connection at the center of wealth management."

FIS currently serves more than 600 financial institutions, representing approximately \$5.5 trillion in assets supported by the platforms, across large financial institutions, community and regional banks, private banks, trust companies, family offices, registered investment advisors (RIAs), and other specialized wealth management firms.

[About FIS](#)

FIS is a financial technology company providing solutions to financial institutions and businesses globally. We unlock financial technology to the world across the money lifecycle underpinning the world's financial system. Our people are dedicated to advancing the way the world pays, banks and invests, by helping our clients to confidently run, grow, and protect their businesses. Headquartered in Jacksonville, Florida, FIS is a member of the Fortune 500® and the Standard & Poor's 500® Index. To learn more, visit [FISglobal.com](https://www.fisglobal.com).

[About InvestCloud](#)

InvestCloud, a global leader in wealth technology, aspires to enable a smarter financial future. Driving the digital transformation of wealth management, the company serves a broad array of clients globally, including Wealth and Asset Managers, Financial Institutions, RIAs, and TAMPs. As a leader in delivering personalization and scale across advisory programs, including unified managed accounts (UMA) and separately managed accounts (SMA), the company is committed to the success of its clients and is an industry leader with more than \$4 trillion in managed accounts assets. The company is extending this leadership through Altic and PM+, bringing access and scale to alternative investments and enabling advisors to manage public and private assets in a single, connected experience. InvestCloud delivers leading digital wealth management and financial planning solutions, complemented by a unified data platform and agentic AI capabilities. Headquartered in the United States, InvestCloud serves clients around

the world.

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