

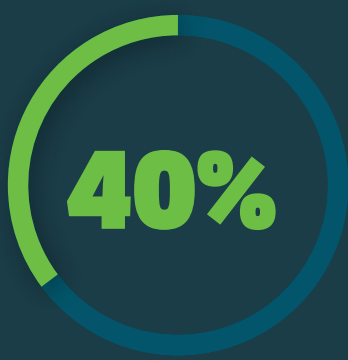


# HOLISTIC WEALTH MANAGEMENT Digitally Enabled. Data Driven.

By 2025, there will be five generations of wealth owners, with different perceptions about wealth, social matters and money.<sup>i</sup>

To capitalize on this opportunity, or even compete, it is critical to build relationships and connect with all five generations.

## This requires a highly personalized and frictionless client experience.



of investors have switched providers or moved assets in the past 3 years<sup>ii</sup>



of investors see highly personalized service as a key factor in deciding whether to stay with their current provider<sup>iii</sup>



of consumers say a smooth, easy customer experience is important when choosing a bank<sup>iv</sup>

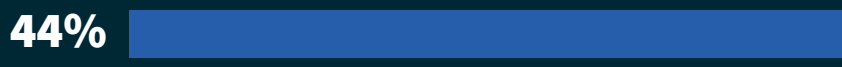


of clients prefer digital channels as their primary method across all wealth management activities<sup>v</sup>

## How do you match or exceed investors' expectations, especially when...



of wealth managers' time is spent on administrative tasks<sup>vi</sup>



of advisors see the need to upgrade client data analytics technology<sup>vii</sup>



of CIOs believe complex legacy technologies pose a significant barrier to the company's digital transformation<sup>viii</sup>

## You leverage technology and data to:

Free up wealth advisors' time to focus on business development and value-added activities



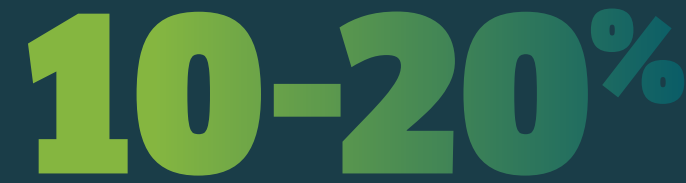
54% of advisors' tasks could be automated or augmented with technology by 2025.<sup>ix</sup>

Provide the tools that deliver a 360-degree view of household accounts



Holistic wealth managers are expected to gain a market share of 30% by 2025.<sup>x</sup>

Drive value with business intelligence and data analytics



Advanced analytics and deep understanding of client preferences increase client acquisition by 10%-20%.<sup>xi</sup>

Expand your technology suite



44% of surveyed banking executives said APIs reduced the amount of time needed to upgrade existing products by 50% or more.<sup>xii</sup>

Unity is a dynamic wealth platform that offers a seamless, multi-channel user experience to front- and middle-office professionals, as well as high-net-worth and institutional investors. It delivers a 360-degree view of household accounts for both the wealth advisor and client, supporting more personalized and collaborative engagements.

With a single platform to manage transactions across all services, together with robust data analytics and workflow, you gain improved front-office efficiencies, freeing up more time to focus on business development and other value-added activities. Unity's open architecture gives you access to a broader ecosystem, positioning you to adapt to the changing needs of investors and grow your business into the future.

<sup>i</sup> The Changing Face of Wealth Management; American Bankers Association; 2019  
<sup>ii</sup> Global Wealth Management Research Report; EY 2019  
<sup>iii,v</sup> Global Wealth: Seizing the Analytics Advantage; The Boston Consulting Group; 2018  
<sup>iv</sup> FIS 2019 PACE Report  
<sup>vi</sup> World Wide Wealth Report; Capgemini; 2019  
<sup>vii</sup> The Future of Financial Planning Is Now: An Aite Group Executive Forum; Aite, 2020  
<sup>viii</sup> Global CIO Survey 2017-2018; Logicalis; 2018  
<sup>ix</sup> Workforce 2025: The Financial Skills & Roles of the Future; Accenture; 2019  
<sup>x</sup> Wealth Management Outlook; EY; 2018  
<sup>xi</sup> Global Wealth Report: Reigniting Radical Growth; The Boston Consulting Group; 2019  
<sup>xii</sup> Unlocking the Hybrid Integration Dividend, Capgemini, 2018



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### About FIS

FIS is a global leader in technology, solutions and services for merchants, banks and capital markets that helps businesses and communities thrive by advancing commerce and the financial world. For over 50 years, FIS has continued to drive growth for clients around the world by creating tomorrow's technology, solutions and services to modernize today's businesses and customer experiences. By connecting merchants, banks and capital markets, we use our scale, apply our deep expertise and data-driven insights, innovate with purpose to solve for our clients' future, and deliver experiences that are more simple, seamless and secure to advance the way the world pays, banks and invests. Headquartered in Jacksonville, Florida, FIS employs about 55,000 people worldwide dedicated to helping our clients solve for the future. 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](http://www.fisglobal.com)