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BridgePortfolio Selects Fiserv's CheckFree to Provide Enhanced Portfolio Management Services

Implementation will provide customers with enhanced functionality, greater efficiency and additional connectivity to enable business growth

Brookfield, Wis., February XX, 2008 – CheckFree, now part of Fiserv, Inc. (NASDAQ: FISV), a leading provider of information technology services to the financial industry, today announced that BridgePortfolio[®] has selected CheckFree APLSM, the industry-leading portfolio management platform, and CheckFree EPL[®] Trading Tools to support its enterprise-wide service bureau offering. The implementation is designed to give BridgePortfolio the ability to offer investment advisors a more customized and cost-effective, back-office outsource solution.

“We chose the CheckFree solution because it is the only portfolio management platform in the industry that will enable us to offer even more customization and functionality in an outsourced, service bureau environment than investment advisors are able to achieve with their own, in-house, portfolio management system,” said Chad Meyer, founder and chief executive officer of BridgePortfolio.

BridgePortfolio's value proposition is to help investment advisors focus on revenue-generating tasks, by taking over non value-adding, back-office functions such as; performance reporting, reconciliation, billing and trade execution. By performing back-end administrative tasks, BridgePortfolio allows advisors more time to help clients with investment decisions that are in turn, executed and tracked via BridgePortfolio.

As it grew in size, BridgePortfolio realized that it needed to reassess its existing system. By implementing CheckFree APL and CheckFree EPL Trading Tools, BridgePortfolio can deliver a more scalable, cost-effective, portfolio management service to its expanding client base.



“BridgePortfolio needed a high-quality, scalable and cost-effective platform to create a viable back-office, outsourcing alternative for the higher-end advisor who has already made a significant investment in an in-house solution,” said Meyer. “By using the CheckFree solution, we are now able to provide our clients with the functionality they require to grow their business while creating greater efficiencies and providing additional connectivity.”

The BridgePortfolio strategy for growth intends to use the functionality of the CheckFree APL solution to improve the efficiency of its service bureau and to be able to offer outsourced, back-office services to more financial advisors. BridgePortfolio will also utilize the new CheckFree EPL Trading Tools to enhance an advisor’s ability to make and execute trading decisions. By utilizing the market-leading APL solution, the company will be able to offer its services to more firms, with a wider range of assets under management and varying levels of existing infrastructure.

“The CheckFree products have a long history of driving industry growth through cost-effective solutions, and our clients benefit from years of experience and development. We look forward to working with BridgePortfolio to help them provide a cost-effective solution to managing back-office functions,” said Mike Gianoni, executive vice president and general manager of CheckFree Investment Services, now part of Fiserv.

About BridgePortfolio.com, Inc.

BridgePortfolio is the leader in developing flexible, customized, private labeled [asset management](#) platforms for investment advisors, investment managers, broker-dealers, financial planners, banks and trust companies to profitably deliver separate account, [ETF and mutual fund model](#) portfolio management. BridgePortfolio has developed a suite of outsourced services including [model portfolio trading](#); private label web-site; efficient online account setup; account administration; performance reporting; billing; third-party separate account management and private-labeled [asset management](#) platform creation and maintenance.

- Deleted: development and hosting
- Deleted: ; model portfolio trading
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About Fiserv, Inc.

Fiserv, Inc. (NASDAQ: FISV), a Fortune 500 company, provides information management and electronic commerce systems and services to the financial and insurance industries. Leading services include transaction processing, outsourcing, electronic bill payment and presentment, investment



management solutions, business process outsourcing (BPO), software and systems solutions.

Headquartered in Brookfield, Wis., the company is the leading provider of core processing solutions for U.S. banks, credit unions and thrifts. Fiserv was ranked the largest provider of information technology services to the financial services industry worldwide in the 2004, 2005 and 2006 FinTech 100 surveys. In 2007, the company completed the acquisition of CheckFree, a leading provider of electronic commerce services. Fiserv reported nearly \$4 billion in total revenue from continuing operations for 2007. For more information, please visit www.fiserv.com.

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