



FIS GLOBAL TRANSFER AGENCY SERVICES

Modern BPaaS and SaaS solutions for the digital era



THE CHALLENGES

Evolving global transfer agency for the modern era.

In today's evolving investment landscape, you need to offer an outstanding customer experience to meet changing investor expectations and sustain growth. Yet legacy transfer agency software and outmoded service models stand in the way of delivering in the digital era.

FIS® Global Transfer Agency Services provides investment managers and fund administrators across multiple jurisdictions with modern BPaaS and SaaS solutions for the digital era. We offer global reach, a tenured team of experts, real-time technology and a bespoke client service model

developed over our 30-year history. With our unique approach to managing successful large-scale conversions, we can ensure a timely transition so your transfer agency services can continue meeting your investors and clients' evolving expectations.

When Mutual of America Financial Group embarked on a strategy to restructure its retail and variable annuity fund families, the firm chose FIS as its partner to support the strategic expansion of its business.

Jeff Young, senior director, Product Management, FIS Transfer Agency

Evolve Your Transfer Agency With FIS

INCREASE YOUR ADVANTAGE

CHALLENGE

ADVANTAGE

A revolving door of transfer agency servicing team members



Tenured in-house experts that operate as an extension of your team

Inflexible, legacy batch technology



Innovative, modern 24/7 global processing technology

Frustrating, inefficient and poorly managed conversions



Fully managed conversions that ensure a minimally disruptive transition

One-size-fits-all service models



A tailored service model to meet your unique needs

**Global Transfer Agency Services:
evolving your transfer agency to meet
changing investor expectations.**

Contact us today 

OPERATING GLOBALLY, SERVICING LOCALLY

Our teams and technology support various fund types, including mutual funds, collective investment trusts, UCITS, SICAVs, OEICs and unit trusts across multiple jurisdictions, including the United States, Canada, Bermuda, Cayman Islands, Ireland, United Kingdom, Luxembourg and Hong Kong.

We have a global team to support you, with FIS transfer agency services personnel located around the world.

Where to Find Us Across the Globe



Evolve Your Transfer Agency With FIS

BESPOKE SERVICE, GLOBAL PROVIDER

\$2.2T in AUM

9M investor
accounts

1,500+ team members
globally

5,000 funds

**Global Transfer Agency Services:
evolving your transfer agency to meet
changing investor expectations.**

Contact us today 

Don't leave your clients stuck in the past.

Evolve your transfer agency services for the modern era.

CONTACT US TODAY.

About FIS

FIS is a leading provider of technology solutions for merchants, banks and capital markets firms globally. Our employees 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.

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**ADVANCING THE WAY THE WORLD
PAYS, BANKS AND INVESTS™**