An intelligent workspace that transforms client data into higher-value advice

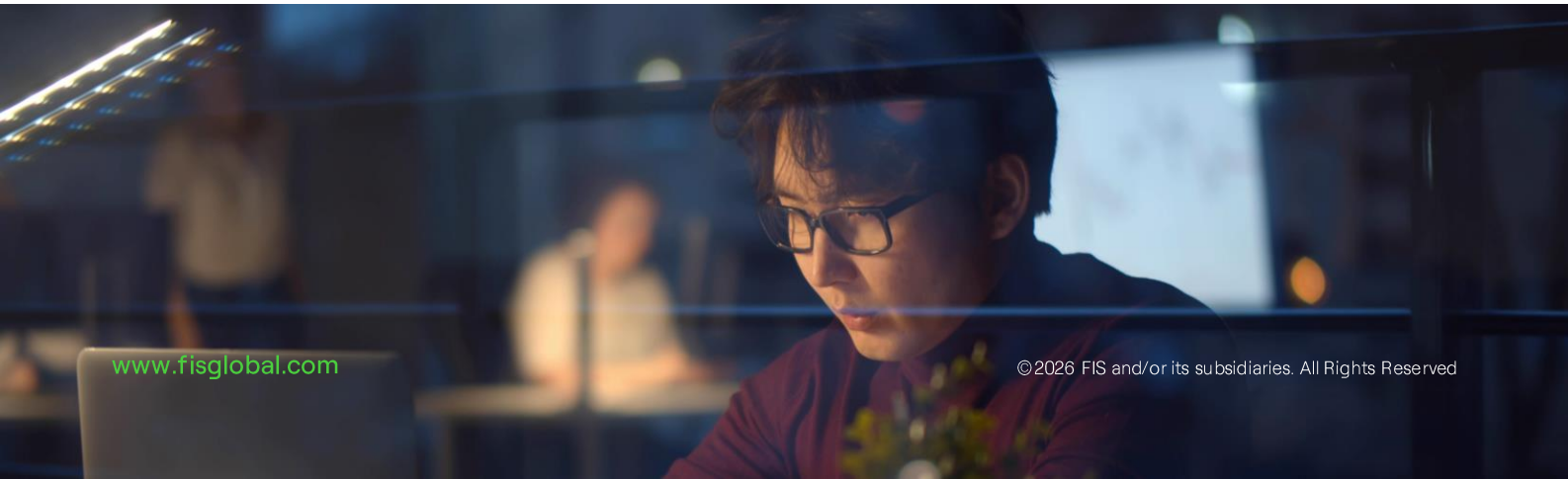
FIS Digital Wealth with InvestCloud

For too long, wealth management advisors have struggled with having to utilize fragmented tools. Advisors toggle disconnected systems, manually aggregate data and spend time on administrative work that should be automated. That's time not spent with clients -- and in a competitive market, that friction shows up in attrition.

FIS® Digital Wealth with InvestCloud is a single, intelligent desktop that unifies trust, brokerage, and advisory - without replacing your existing systems. It connects client data into a shared model and uses embedded AI to turn every interaction into actionable insights and measurable outcomes.

With FIS Digital Wealth, advisors and firms can

- Save **8+ hours per advisor/week** on research, meeting prep, and follow-up
- Increase net new assets by **5-8%** and annual revenue growth by **2-4%**
- Reduce attrition by **3-5%** with earlier risk detection
- Increase advisor capacity and coverage across the book



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Elevate advisor impact

By connecting data and AI into a single, configurable workspace, advisors spend less time on administration and more time delivering timely, high-value advice.

Key features & capabilities

Robust dashboard & 360 client view
Get a complete view of relationships, portfolios, and life events in one place, so advisors can quickly understand client needs and act.

Security, governance & supervision
Enterprise-grade controls include supervision-ready audit trails, role-based access, SOC-2-ready controls, and AI guardrails such as zero LLM data retention, automated PII redaction, and human-in-the-loop approvals.

AI assistants, insights & analytics
AI is embedded directly into the workspace, turning client data into insights and actions that increase advisor productivity and impact.

Advanced investment reporting
Analyze portfolio views across holdings, cash flow, and complex assets, giving advisors the details they need to support high-value client conversations.

Bi-directional document vault & secure messaging
Collaborate with clients through secure document sharing and messaging, reducing friction and keeping all interactions tracked and compliant.

Report bundler & document automation
Create and deliver client-ready reports faster with automated bundling and publishing.

Digital Wealth scales with your firm's needs

Digital Wealth is offered in three platform packages: Essentials, Enterprise, and Elite.

Essentials: Core access and advisor productivity

A modern entry point that provides secure access and the essential tools advisors need to manage client relationships efficiently.

Enterprise: Connected journeys and collaboration at scale

Adds communication, collaboration, and reporting capabilities that help advisors manage the full book, reduce manual work, and improve consistency across teams.

Elite: Full front-office intelligence

Delivers end-to-end relationship management with AI-powered intelligence, enabling firms to scale personalized advice and service.

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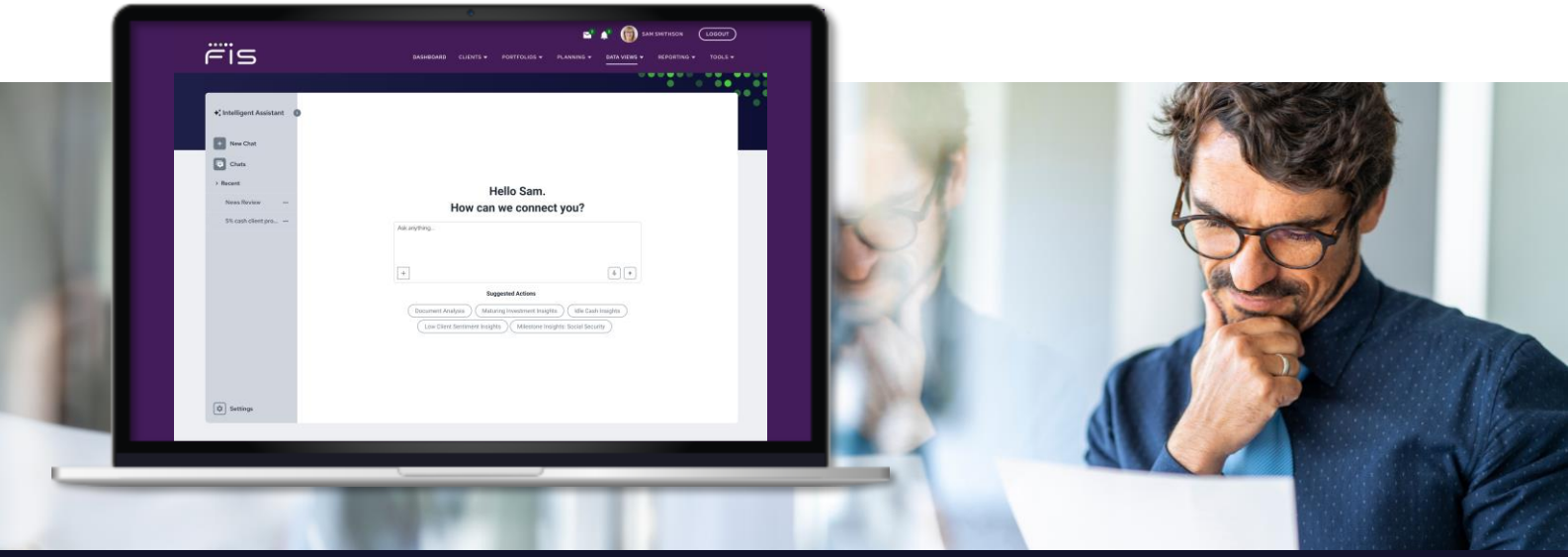
Why firms choose FIS Digital Wealth with InvestCloud

One connected advisor–client experience, not separate portals

Works with existing systems, without replacing your core platform

Shared data foundation, aligning every interaction across the front office

Proven enterprise scale and flexibility across different advisor models



Money at rest Money in motion Money at work™

Money at rest

Unlock seamless integration and human-centric digital experiences while ensuring efficiency, stability, and compliance as your business grows

Money in motion

Unlock liquidity and flow of funds by synchronizing transactions, payment systems, and financial networks without compromising speed or security.

Money at work

Unlock a cohesive financial ecosystem and insights for strategic decisions to expand operations while optimizing performance.

About FIS

FIS is a financial technology company providing solutions to financial institutions, businesses and developers. We unlock financial technology that underpins the world's financial system. Our people are dedicated to advancing the way the world pays, banks and invests, by helping our clients confidently run, grow and protect their businesses. Our expertise comes from decades of experience helping financial institutions and businesses adapt to meet the needs of their customers by harnessing the power that comes when reliability meets innovation in financial technology. 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. Follow FIS on LinkedIn, Facebook and X (@FISglobal).

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Advancing the way the world pays, banks and invests™