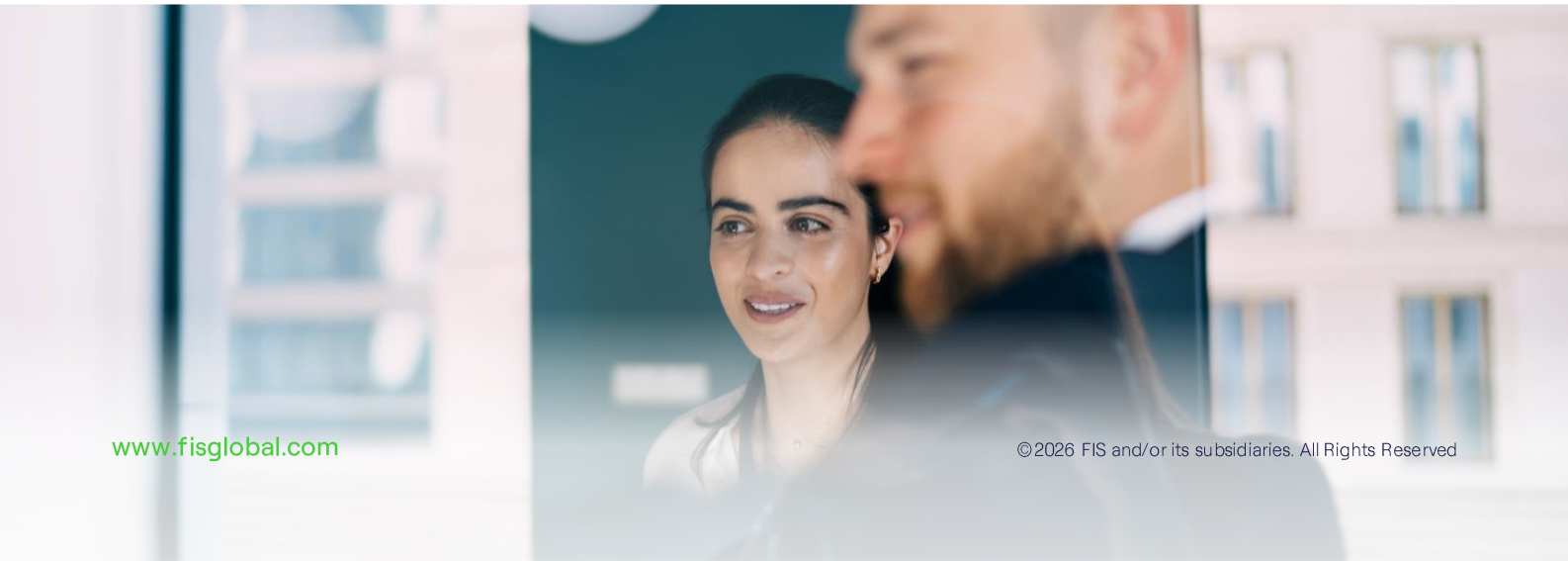
The connected digital experience for modern wealth clients

Wealth management clients increasingly expect a seamless, e-commerce-like digital experience — but instead face multiple logins and disconnected tools that obscure their full financial picture and weaken advisor engagement.

FIS® Digital Wealth with InvestCloud is a fully branded digital layer that unifies client interactions across trust, brokerage, and advisory—without replacing core systems. It turns client engagement data into actionable insights that improve service, enhance personalization, and accelerate growth.

With FIS Digital Wealth, firms and advisors can:

- Boost digital interaction rates by **25–35%** with personalized, omnichannel experiences
- Increase advisor-to-client coverage by **20–30%** without sacrificing personalization
- **Increase client engagement and grow share of wallet** with on-demand, unified visibility across clients' entire financial life
- **Reduce servicing costs** through digital journeys



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Reimagine the client experience

A single, digital environment where clients complete tasks, connect with advisors and access personalized insights—all within your brand. Every interaction is captured and fed into the advisor workspace, reducing manual work while enabling faster, more informed advice.

Key features & capabilities

Robust dashboard & portfolio transparency
An immersive, configurable client dashboard that surfaces net worth, balances, performance summaries and prioritized client actions.

Flexible investment reporting
Analyze accounts, holdings and transactions with powerful filtering, grouping and export tools, supporting more informed client conversations.

Security, governance & supervision
- Supervision-ready records for every interaction (logins, messages, approvals, instructions).
- Roles, entitlements and household aware access to model complex relationships.
- Enterprise security and compliance controls including SSO integrations and audit logging.

Mobile-first experience
Mobile dashboards, approvals, messaging and context-aware notifications designed to complement — not duplicate — desktop experiences. This mobile layer spans prospects, clients and intermediaries for a consistent experience.

Account aggregation & net worth
Unify held-away and custodial assets into a single view—helping clients and advisors identify opportunities and act faster.

Financial education & digital referrals
Interactive financial education content and a simple digital referral flow that helps grow advisor books organically.

Bi-directional document vault
Secure, supervision-ready document exchange between clients and advisors with audit trails.

Why firms choose FIS Digital Wealth with InvestCloud

- **One connected advisor–client experience,** not separate portals
- **Shared data foundation,** aligning every interaction across the front office
- **Works with existing systems,** without replacing core platforms



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Digital Wealth scales with your firm's needs

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

Essentials: Core digital access and transparency

Provide clients with a secure, branded experience to view accounts, track performance, and access key documents—building trust through clear, always-on visibility into their wealth.

Enterprise: Deeper, digital engagement

Enable ongoing client interaction with mobile access, secure messaging and guided digital journeys that reduce manual work and make it easier for clients to act.

Elite: Full client journey orchestration

Connect prospecting, account opening, investing, planning, reporting and servicing into one seamless experience, helping firms convert more prospects, capture more assets and deepen long-term relationships.



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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