



FIS GLOBAL TRANSFER AGENCY SERVICES

Global Transfer Agency Services for the Modern Era

As the investment landscape continues to change, you need to offer an outstanding customer experience to meet changing investor expectations and sustain growth for your business. So why rely on legacy transfer agency software and outmoded service models that are at odds with evolving investor demands – and your goals?

FIS® Global Transfer Agency Services provides investment managers and fund administrators across multiple jurisdictions with modern BPaaS and SaaS solutions for the digital era.

As a global transfer agency services provider, we offer the scale and investment of the world's leading fintech provider, giving you a tenured team of experts alongside modern technology.

Underpinning our solution is our unique service model, developed over our 30-year history. With our proven approach to managing successful large-scale conversions, you can continue to meet your investors and clients' evolving expectations.



PARTNER WITH A GLOBAL LEADER

Access worldwide coverage and processing capabilities via a multi-jurisdictional, multi-currency, multi-lingual solution.



PROCESS IN REAL TIME

Leverage real-time technology that helps you keep pace with rapidly evolving expectations.



CONVERT WITH CONFIDENCE

Rest assured that your entire data migration will be planned, managed and executed in a timely fashion, with minimal disruption – no matter how complex.

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RELY ON THE INDUSTRY'S A-TEAM

We operate as a specialist service within the world's leading fintech provider. Our team has decades of experience within all areas of the asset management industry in addition to transfer agency servicing and technology.

STRENGTHEN YOUR SECURITY AND CONTROL

The FIS secure-by-design approach gives you confidence that your investors and their data are protected. Cybersecurity is in our DNA, and we operate within a framework of the highest standards for security and compliance. Plus, we have an all-encompassing culture of multi-tiered compliance, so we can offer next-level support to our clients.

TAKE A NEW APPROACH TO PARTNERSHIP

Because of our unique approach to client partnership, our service models are bespoke and we operate as a true extension of your team. Your client services team will engage with you on a daily, weekly, monthly and quarterly basis throughout all stages of our partnership – from selection to transition to business-as-usual, and ongoing as your business evolves.

“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 services for the modern era.

Contact Us Today.

GETINFO@FISGLOBAL.COM

\$2.2 trillion
in AUM

9 million
investor accounts

1,500+
team members globally

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 linkedin.com/company/fis

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FIS

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