



OPPORTUNITY

Improve existing systems to increase speed, mitigate errors and unify siloed systems.

INNOVATION

FIS designed a new system to address customer needs with modern technology.

SOLUTION

FIS AddVantage, built on **InterSystems IRIS**, is a dynamic, cloud-based system designed to meet the needs and requirements of wealth management customers at scale.

IMPACT

The AddVantage platform's effect has been strongly positive, with success markers in adoption, revenue, and client satisfaction. It achieves for wealth management what similar cloud-based SaaS and integration solutions have accomplished elsewhere for Big Data.

FIS AddVantage Revolutionizes Wealth Management with Real-Time Data and Intelligent Automation

The wealth management industry has long faced significant challenges, including operational inefficiencies, regulatory compliance issues, and the need for enhanced client satisfaction. Traditional systems often struggled to keep up with the dynamic demands of the market, leading to siloed data, manual processes, and limited scalability. Recognizing these pain points, **FIS Global** developed FIS AddVantage to address these issues and provide a cloud-first platform that integrates real-time data access, intelligent automation, robust security, and flexible deployment options, ensuring that firms of all sizes can operate with performance and agility.

FIS Achieves High Performance and Data Accessibility with InterSystems IRIS

FIS AddVantage is an innovative platform designed to revolutionize the wealth management industry by providing financial institutions with the tools and adaptability needed to thrive in a dynamic market. Leveraging **InterSystems IRIS**, a cloud-first data platform, AddVantage simplifies the integration of high-performance applications and data silos, significantly reducing manual effort and enhancing data accessibility. Key features include Code Connect and Wealth APIs—which expand offerings and facilitate broader integration—and Wealth-as-a-Service, which provides scalable outsourcing and asset servicing solutions, allowing firms to focus on strategic growth.

Growing, Scalable Impact on Revenue and Client Adoption and Satisfaction

FIS AddVantage has had a profound impact in the wealth management industry, with a high client adoption rate of over 85%, a 25% increase in client satisfaction scores, and a 15% boost in revenue. These improvements are driven by enhanced client retention, faster onboarding processes, and scalable service delivery. The platform's innovative CRM integration streamlines access to critical data and reduces the effort required for front-end system transitions, while its Wealth-as-a-Service solution allows financial institutions to focus on strategic growth by providing global outsourcing and asset servicing solutions.

“We have learned to expect the unexpected. Disruption in the industry will continue. But with streamlined technology on your side and the right strategic partner, you can keep your expenditure down and increase your competitive advantage.”

“Our mission is to empower financial institutions to streamline their wealth operations, meeting the ever-changing demands of clients and the complexities of financial markets.”

*FIS Global Wealth,
Retirement & International
team*

Key Features of FIS AddVantage

Code Connect and Wealth APIs: FIS AddVantage offers Code Connect and Wealth APIs, which provide open, API-enabled technology for both inquiry and transactional needs, allowing financial institutions to expand their offerings and reach new markets. This flexible and adaptable feature is tightly integrated with FIS Banking APIs, enabling broader integration and seamless connectivity across various financial systems.

Wealth-as-a-Service: The Wealth-as-a-Service component of FIS AddVantage gives financial institutions control over their core business through global outsourcing and asset servicing solutions. Designed to be scalable, this service is tightly integrated with the platform and supported by experienced professionals. It allows firms to focus on strategic growth while ensuring that their operational needs are met with high efficiency and reliability.

FIS Investor’s View Integration: FIS AddVantage integrates with FIS Investor’sView to deliver real-time portfolio oversight, regulatory trade compliance, and reporting. It supports multi-custodial trade processing and automated order management, enhancing speed, accuracy, and efficiency across the investment lifecycle. This integration is crucial to navigate the complexities of financial markets and regulatory requirements.

InterSystems IRIS Data Platform: The platform leverages InterSystems IRIS, a next-generation, AI-enabled data platform that simplifies the development and deployment of high-performance applications. InterSystems IRIS unifies data and application silos, enabling the agile and intelligent operations and decision-making, essential in the dynamic wealth management industry.

About the Winner: FIS Global

FIS Global is a leading financial technology company that empowers financial institutions to streamline their operations and meet the evolving demands of the market. With a wide range of solutions, including wealth management, FIS Global helps clients achieve operational efficiency, regulatory compliance, and a competitive edge. Their innovative platform, FIS AddVantage, is a testament to their commitment to driving growth and enhancing client satisfaction.

About the InterSystems Impact Awards, Selected by an MIT Panel

Each year select client organizations are recognized at the InterSystems READY conference for projects driving positive change. Nominations are evaluated by independent judges from MIT on three criteria:

- **Makes a significant difference**
- **Breaks new ground**
- **Sets an example**

To learn more about the InterSystems Impact Awards visit

<https://www.intersystems.com/intersystems-impact-awards/>.