

## FOR IMMEDIATE RELEASE – WALL STREET & BAY STREET INVESTMENT NEWS

Toronto, Canada – November 3, 2006

### **WHEN IT COMES TO BROKERAGE FIRM PRODUCTIVITY, PRICEMETRIX'S HIGH PERFORMERS DELIVER!**

#### **Toronto, Canada:**

Leading US Financial Consultants were recently studied to discover their productivity, profitability and client success formulas. Portfolio productivity, asset size and revenues improved by up to 20% for these 'Growth All Stars', a PriceMetrix analysis reports after studying thousands of participants using the PriceMetrix Program and Platform.

"Our exclusive and patented platform and productivity programs turn average performers into high performers" says PriceMetrix President & CEO Doug Trott.

PriceMetrix, the North American market leader in improving retail brokerage and investment sales force results, today announced the publication of its *High Performers Broker Survey*, which identifies and analyzes the characteristics of the Top 100 US Financial Consultants using the PriceMetrix Platform and Program.

Between August 2005 and August 2006, the Top 100 US Financial Consultants saw average increases in assets of \$12.9 million (14%), increased revenues of \$116,000 (20%) and increased average assets per household of \$30,000 (12%).

"The Growth All-Stars finished the 12 month period with \$104 million in assets and \$682,000 in production: a very impressive group" said Trott.

"The US Growth All Stars using our platforms have demonstrated a highly disciplined approach to managing the growth of their business, and in creating high performance financial value for their clients, their firms and for themselves".

The PriceMetrix Analyst Group studied the 'work smarter' tactics and strategies employed by the High Performers. They include:

- A focus on increasing the assets of existing moderate sized households, and generally improving client mix through more intelligent segmentation. Their average household maintains 21% more assets with them when compared to the average performers.
- High Performers cross sell their clients 10% more often than the average performers. Overall, 41% of their clients are cross sold.
- Assets of High Performing FCs are more productive, overall earning 6% more than the average performers. One means by which they accomplish this is by

discounting less than their average counterparts. Discounting does not generate volume, revenue or asset growth across cohorts of FCs.

- High Performers also generate recurring revenues that account for 35% of their production.
- They set clear pricing expectations with clients: they have on average 81 households paying them more than \$1,500 per year for their full service offering, compared to the average performers with 33 households meeting that revenue threshold. As a result, their average revenues per household exceed that of the average performers by 25%.

“Clearly when you give financial advisors the right tools, even in flat markets, they can generate organic growth through better management of their book, and drive better segmented sales and marketing efforts” states Mr. Trott.

**About PriceMetrix:** PriceMetrix is exclusively focused on assisting retail investments firms grow their assets and revenues by assisting individual Financial Consultants to become better CEOs of their businesses. Our Platform & Program is a combination of **Reports** (market & business intelligence), **Tools** (on-line calculators, case studies, etc.), **People** (client management team), and **Campaigns** (customized to meet individual firms’ goals) that enable advisors and management to proactively evaluate their businesses and business lines. PriceMetrix Platform & Program clients experience increases in fee-based assets, assets per Financial Consultant, assets per household and increases in pricing across all product lines. PriceMetrix is based in Toronto, Canada and services a growing North American client base.

- 30 -

For More Information Please Contact:

Doug Trott  
President  
PriceMetrix  
416.955.0514 ext 229

To request a copy of the detailed survey, please email [doug.trott@pricemetrix.com](mailto:doug.trott@pricemetrix.com)