

NEWSRELEASE

FOR IMMEDIATE RELEASE

PriceMetrix Launches ClientCheck™

State of the Art Dashboard Gives Financial Advisors Instant Client Intelligence

Toronto, Ontario, January 6, 2011 – PriceMetrix, a software firm that helps retail wealth management firms and their advisors optimize selling efforts, manage clients, identify growth opportunities, and enhance practice management, announced today the launch of ClientCheck, a state of the art client dashboard for advisors. At the click of a mouse, ClientCheck gives advisors a complete snapshot of each client at the household level. ClientCheck delivers all the important vitals an advisor needs to know to better service and enhance their client relationships. To view a sample of ClientCheck click here: <http://bit.ly/ClientCheck> .

PriceMetrix delivers productivity enhancing solutions that address the needs and realities of managing a successful wealth management practice. “Forty percent of households pay their Broker less than \$250 per year, which means they likely have a larger business relationship with their Starbucks Barista. We developed ClientCheck to help identify opportunities to broaden and deepen individual household relationships. Advisors who participated in the alpha and beta testing declared that ClientCheck would greatly enhance their business practices. Branch managers also stated that ClientCheck will enable more productive conversations with their advisors by helping them to zero in on revenue opportunities,” said Doug Trott, PriceMetrix President, and CEO.

ClientCheck enables advisors and their teams to identify business opportunities at the household level. Powered by an automated search and proprietary business intelligence engine, ClientCheck:

- Instantly delivers pertinent details for a specific household, including: ranking of the household by assets, revenue, product breadth, asset, and revenue mix, historical trending compared to the rest of the advisor’s book and peer group; and key business metrics (e.g., recurring revenue, total revenue opportunity, and average ticket size).
- Reveals three revenue-generating options to support the advisor’s business and client goals.
- Is accessible through the PriceMetrix advisor Workstation and is designed to be used by advisors and their teams on a daily basis to improve productivity.

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ClientCheck is the newest addition to the PriceMetrix ValueOne solution and is available exclusively to ValueOne clients. ValueOne delivers enhanced business intelligence regarding investment advisor activity, relative performance, and enterprise-wide benchmarking against competitive practices. ValueOne helps retail wealth management firms improve investment advisor practice management strategies, coaching, and productivity. ValueOne is fueled by a rich and longitudinal data warehouse representing 15,000 advisor books, 2.3 million investors, 380 million transactions, 1 million fee-based accounts, 4 million transactional accounts and over \$850 billion in investment assets.

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About PriceMetrix:

PriceMetrix is a software firm that helps retail wealth management firms and their advisors optimize selling efforts, manage clients, identify growth opportunities, and enhance practice management.

Through its exclusive relationships with North American retail wealth management providers, PriceMetrix directly measures aggregated data representing 2.3 million investors, 380 million transactions, 1 million fee-based accounts, 4 million transactional accounts and over \$850 billion in investment assets. PriceMetrix combines its patented process for collecting and classifying data with proprietary measures of revenue, assets, and households to create the most insightful and granular retail wealth management database available today. PriceMetrix was recently recognized in the top 250 ICT Companies Listing in the 2010 Branham300.

Our comprehensive data on the business practices of retail investment advisors and their clients inspired the development of the award-winning, patented ValueOne™ that now includes ClientCheck™, our patent pending CommissionCheck™, our U.S. Market-Based Equity Commission Schedule, and FeeCheck™, a recent practice management innovation from PriceMetrix.

Founded in 2000, PriceMetrix has its principal place of business in Toronto, Ontario, and services a notable range of clients within the United States and Canada. For more information about PriceMetrix Web-based practice management solutions, please contact us at 416-955-0514 or info@pricemetrix.com or visit us at www.pricemetrix.com.