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PriceMetrix Introduces FeeCheck™

First Market-Based Pricing Tool for Financial Advisors with Fee-Based or Managed Account Business

Toronto, Ontario, September 22, 2010 — PriceMetrix is introducing the first ever market-based pricing tool for financial advisors to help them charge appropriate prices for their fee-based or managed account business. FeeCheck allows financial advisors to compare their proposed fees with others at their firm or in the broader marketplace to learn whether they are under pricing, appropriately pricing their services, or charging a premium. PriceMetrix is the market leader in delivering practice management intelligence and analytical tools that help over 10,000 Investment Advisors in North America achieve measurable productivity improvements.

“As more advisors turn to fee-based products to better serve clients, they need reliable reference points to determine their pricing,” said Doug Trott, President, and CEO of PriceMetrix. “FeeCheck is the first product to give advisors benchmark fee pricing information, allowing them to determine the pricing strategy that best suits their products and clients.”

Providing practice management solutions to a wide range of North American firms, including Morgan Stanley Smith Barney, Hilliard Lyons, BMO Nesbitt Burns and ScotiaMcLeod, PriceMetrix helps financial advisors improve their productivity and profitability. The company draws upon data from 20,000 full service advisor books in its secure database to power FeeCheck and refreshes the data monthly to ensure maximum accuracy and current market relevance.

“Building and managing a successful wealth management practice means getting the right clients and tailoring the right products and investments to meet their needs,” said Mr. Trott. “It also means that advisors have to price their services properly to ensure they’re aligned with the value being delivered to clients. FeeCheck gives advisors the information they need to do just that.”

FeeCheck is easily accessed during the account opening process. An advisor enters a few simple facts into the system about the account he or she is interested in pricing and FeeCheck’s statistical engine does the rest. It looks for the most appropriate comparison accounts and displays comparable fees based on actual market behavior. Advisors can see how their potential fee compares to the market in a

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number of ways, including the median fee charged by other advisors or the top quartile for particular types of accounts. Advisors can also easily perform 'what if' scenarios to determine how a change in price or desired return on assets would affect their competitive pricing.

"FeeCheck is a powerful tool for retail wealth management firms and their advisors," said Mr. Trott. "Being able to compare their potential fees to their peers or the wider marketplace enables advisors to price with confidence."

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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 1.5 million investors, 200 million transactions, 1 million fee-based accounts and \$800 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™, our patent pending CommissionCheck™ and our U.S. Market-Based Equity Commission Schedule. FeeCheck™ is the newest practice management innovation from PriceMetrix. It is designed to help retail wealth management firms and their financial advisors make more informed market-based pricing decisions for their fee and managed business.

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.