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Financial Advisors Achieve Positive Measurable Results in Downturn

Toronto, ON, September 29, 2009 - It has been a year since the Dow was at 11,000. It still remains below 10,000, after reaching its low below 7,000 in the second quarter of 2009. Retail brokers have witnessed the value of fee-based assets, and their associated revenues, decline with the drop in market valuations. However, most have experienced increased levels of retail transactions as the market picked up.

PriceMetrix ValueOne™ users have fared well in what has been a tumultuous financial period filled with anxious clients and significant industry change and consolidation.

ValueOne usage has expanded significantly in the last few years and now provides systematic and scalable practice management tools that are generating positive, measurable results for 10,000+ retail Financial Advisors in North America.

We examined how ValueOne users performed in three dimensions over the last year: fee based products, client penetration, and pricing. The short answer: they fared very well indeed.

- 52% of ValueOne users sold additional products to existing clients, increasing their cross-sell and penetration;
- 41% of ValueOne users increased their number of households with fee-based accounts;
- 43% of ValueOne users maintained or increased their levels of transactional pricing.

Even in a remarkably weak period for retail investments and capital markets, PriceMetrix ValueOne users sold more products, increased their fee-based accounts, and improved their pricing. According to Robert Byler, Portfolio Manager and Director, Private Client for GMP Private Client L.P., "Used as a tool to segment my business, measure pricing, and to compare my model to my peer group, PriceMetrix is an integral part of my business. It is a vital part of resetting growth targets, establishing my plan for growth, and capturing opportunities following the most significant financial crisis we have lived through since the Depression."

Additionally compelling are the average client improvement results achieved in the first year of working with the ValueOne Program:

- 12% increase in total assets;
- 13% increase in total revenue;
- 13% increase in percentage of list price realized;
- 22% increase in average household assets; and
- 15% decrease in trades below discount brokerage rates.

"In the last twelve months, one of our larger clients experienced a \$12 million revenue lift on a \$1 million spend," said Doug Trott, President and CEO of PriceMetrix.

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Consider how potent the PriceMetrix ValueOne Program would be for your firm as market conditions improve. You would be able to:

- Equip Financial Advisors, Branch and District Managers to recover a substantial portion of the value being left 'on the table' relative to your value proposition and direct competitors;
- Support and drive a metrics-based performance culture;
- Support and drive cross-sell initiatives;
- Achieve market leading and premium levels of pricing aligned to your value proposition;
- Facilitate the development of significant business intelligence at the enterprise-wide level to guide executive decision making.

For more information on how PriceMetrix and the ValueOne Program can help your Financial Advisors achieve measurable and sustainable results, please contact:

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About PriceMetrix

PriceMetrix is dedicated to delivering solutions that enhance the overall business results of retail brokerage firms by helping financial advisors, mid-level managers, and senior management become better 'CEOs' of their business. With 10 years of experience, we are the leader in delivering systematic and scalable practice management to retail brokerage firms and their financial advisors.

Our comprehensive understanding and experience inspired the development of award-winning, patented technology in the ValueOne Program. CommissionCheck, the newest practice management innovation from PriceMetrix, is designed to help retail brokerage firms and their financial advisors increase productivity and revenue.

Founded in 2000, PriceMetrix has its principal place of business in Toronto, Ontario, and services a notable range of clients within Canada and the United States.