

PriceMetrix Introduces “PriMe” Awards; Honors Being Given To Top 50 Most Productive Financial Advisors and Top 50 Most Improved Advisors

Toronto, Canada, December 13, 2007—PriceMetrix, the leading service and software firm specializing in improving broker production, today announced the launch of PriceMetrix Merit (PriMe) Awards, designed to honor the most productive and improved financial advisors who use the company’s patented Productivity Program.

PriceMetrix evaluated more than five thousand advisors using the program and ranked them in three main categories using 13 different performance measures. The categories were client and asset production, product diversity and revenue and pricing. The performance measures included the number of active versus stagnant households, the amount of recurring revenue, cross-selling activity, and pricing relative to market benchmarks.

Based on the criteria, PriceMetrix has awarded PriMe honors to the 50 most productive advisors using its program, as well as the 50 most improved. Across the board, the top producers focused on high net worth clients. They had an average of \$255 million in assets under administration and averaged \$2.1 million in annual production. Top producers also had high assets per household, averaging \$570,000 each. Only 20 percent of their clients generated small amounts of revenue, defined as \$250 a year or less per household. Quite the opposite, almost three quarters of the top producers’ clients generated over \$1,500 in annual revenue.

The most improved advisors on the program focused on getting the right clients, offering the right products and charging the right price. They increased their assets under administration by an average 87 percent and their annual production by a staggering 207 percent! They also increased recurring revenue by 60 percent, mainly by generating more fee-based business.

The 2007 PriMe Award for Business Excellence in Canada went to The Mailey Rogers Group of ScotiaMcLeod. Kim Mailey, co-founder of this boutique wealth management group in West Vancouver, says he significantly improved his business by focusing on a few key steps and by working with PriceMetrix tools and support professionals. "We made a decision to significantly re-engineer our practice a few years ago. In a matter of a few years, we were able to maintain our assets under management while reducing our household count by 78 percent. These accomplishments were the result of a bold business plan and the confidence to see it achieved. Without the tools provided by PriceMetrix, we would not have been able to diagnose the state of our business, nor track the progress we were making on the specific targets we had set. PriceMetrix has been a contributor to making our business a more efficient, better run, forward thinking business that adapts, recognizes and responds to our clients needs. Thank you PriceMetrix!"

"We congratulate Kim and all the top and improving advisors for their terrific performances," said Doug Trott, President and Chief Executive Officer of PriceMetrix. "By focusing on the right clients, the right products and the right pricing strategies, these men and women have been able to get the most success out of their professional practices."

For more information on the PriMe Awards please contact Doug Trott, President and Chief Executive Officer of PriceMetrix, at 416.955.4498.

PriceMetrix focuses exclusively on assisting investment firms increase productivity and revenue by helping individual Financial Advisors become better CEOs of their business. The PriceMetrix Program is a patented combination of Reporting Dashboards, Tactical User Tools, and comprehensive Support and Training solely designed to enable advisors and management to proactively identify and close client, asset, revenue, product and pricing opportunities. For over seven years, PriceMetrix clients have experienced improved assets per Financial Advisor, revenue per Financial Advisor, and household quality, as well as increased fee-based business and enhanced pricing.