

## PRESS RELEASE

### MBO Cleary Advisors Enhances Client Reporting

#### Assette continues to expand client roster

**BOSTON, MA - October 20, 2009** - Assette, the company that makes it easy to integrate data and create client reports, announced today it will provide Assette Statements™ software to MBO Cleary Advisors, Inc., an institutional investment advisor and investment consultant based in Milwaukee, Wisconsin and a division of Cleary Gull Holdings, Inc.

MBO Cleary Advisors will use Assette Statements to easily combine data from multiple investment applications and to quickly create customized monthly and quarterly client reports in PDF format. The system will also be used to facilitate collation and the electronic delivery of client reports to investors, consultants, and other interested recipients.

"We embarked on a search for a better client reporting platform last year and had already selected Assette Statements as the solution for the private wealth management division of Cleary Gull Inc.," said Cleary Gull Chief Operating Officer Chris Carpenter. "We wanted to make sure they could meet the more demanding and complex reporting requirements of our institutional clients in MBO Cleary Advisors. Before expanding our relationship with Assette, we needed a high degree of confidence in their implementation process, at which Assette excelled during the initial project with Cleary Gull Inc."

"Using Assette Statements, MBO Cleary Advisors will be able to complete their monthly and quarterly client reporting cycles more efficiently and provide customized content to their investors when needed," said Marc Filipkowski, Assette's Director of Sales and Business Development. "Our ability to integrate data from MBO Cleary Advisor's portfolio accounting system, together with an easy-to-use reporting front-end and the capability to integrate sets of customized analytical information into reports using pre-existing templates, will allow MBO Cleary Advisors to realize significant gains in efficiency, scale, and overall client satisfaction."

Assette believes the MBO Cleary Advisors agreement, as well as other deals signed recently by Assette, is a strong signal that despite a continued tough environment client reporting continues to be an area of focus to improve efficiency.

MBO Cleary Advisors is a wholly-owned subsidiary of Cleary Gull Holdings, Inc., a privately held, employee-owned organization. Together with Cleary Gull Inc., the firm serves clients nationwide through three specialized operating divisions: Institutional, Private Client and Investment Banking. Since 1987, the firm has provided high-quality financial services to institutional investors, middle market companies and individuals. For more information, please visit [www.mboCleary.com](http://www.mboCleary.com).

### About Assette

Assette makes it easy to integrate data and create client reports. Client service personnel, marketing staff and portfolio managers can easily integrate data and deliver customized information to clients and prospects in significantly less time using the company's software-as-a-service applications. Based in Boston, Assette focuses on improving sales and client service in the asset management industry through higher quality presentations, statements, and online account access. For more information, please visit [www.assette.com](http://www.assette.com).

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