

PRESS RELEASE

Analysis Shows Client Reporting Technology Saves 400 Hours, Gains Millions in Assets

Free customized ROI report available at www.assette.com/ROI

BOSTON, MA, July 16, 2009 - At a time when asset managers are cutting costs but still trying to grow their businesses, [client reporting technology](#) is becoming the tool of choice for more efficient and productive sales and client service.

Boston-based Assette offers its Assette Presentations™ system to ease the burden of creating customized sales presentations and client meeting books. The application can save the typical asset management firm hundreds of hours each year. This time can then be re-allocated to revenue-generating business development and proactive client service initiatives.

Assette Presentations can produce a customized sales presentation or client meeting book in about 30 seconds rather than the typical two-to-three hours it takes most asset managers. Using the software can save the typical asset manager about 400 hours per year by eliminating the majority of time it takes to create such presentations.

To prove its return on investment value, Assette invites asset managers to receive a free ROI report at its website at www.assette.com/ROI. Simply register to receive the report, enter a few relevant data items and Assette will e-mail the ROI analysis to you within 2 business days.

Using real cost estimates and reasonable assumptions, a typical asset manager's return on investment works like this:

- The cost to implement the fully hosted Assette Presentations system can be as low as \$15,000 with monthly fees starting at \$1,200.
- If a firm spends \$15,000 to implement Assette Presentations with a monthly fee of \$1,200 then the first year cost for the application is \$29,400. In subsequent years, the annual cost drops to \$14,400.
- If a firm generates 200 presentations each year with each presentation taking about two hours to produce, then Assette Presentations can save the firm about 400 hours of effort annually or almost 8 hours per week.
- If the firm re-allocates these 400 hours to proactive client service and/or business development initiatives, it's reasonable to assume that new client assets could be gathered or "at-risk" existing client assets could be retained.
- Assuming a fee of 50 basis points and just \$8 million in incremental assets gathered or retained, \$40,000 of additional revenue would be realized. This results in a significant ROI of 36 percent for the asset manager in the first year. In subsequent years, the ROI would be even greater.

Easy-to-use client reporting technology can save a firm time, effort, and errors. Rather than having highly-paid staff toiling on mundane report administration, they can focus their efforts on nurturing important client relationships, developing new business, and managing investments - a much better formula for success!

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.

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