



**FOR IMMEDIATE RELEASE**

**First Rate Named to the 2009 Inc. 5,000 List  
With Three-Year Sales Growth of 51.4%**

**Arlington, TX** – August 18, 2009 – First Rate<sup>®</sup>, a leading provider of performance measurement solutions for the financial services industry, today announced that it has been named to the Inc. 5000 Fastest Growing Companies in America. After a rapid growth rate of 51.4% over the past three years, First Rate was no. 3,980 on the list. The Inc. 5000 list is the most comprehensive look at the most important segment of the economy – America’s independent-minded entrepreneurs. Taken as a whole, these companies represent the backbone of the U.S. economy. Consumer electronics maker Vizio, Internet giant GoDaddy, rental car service Zipcar, and beverage maker Honest Tea are among the prominent brands featured on this year’s list.

“Savvy trend spotters and those who invest in private companies know that the Inc. 5000 is the best place to find out about young companies that are achieving success through a wide variety of unprecedented business models, as well as older private companies that are still expanding at an impressive rate,” said Inc. 5000 project manager Jim Melloan. “That’s why our list is so eagerly anticipated every year.”

Founded in 1991, First Rate has emerged as a provider of industry leading performance measurement solutions. Investment management companies nationwide trust First Rate’s ability to deliver superior measurement of performance. First Rate’s applications are web-based and scalable, with the ability to calculate and analyze returns, as well as generate professional reports that are easy to understand. This empowers the internal resources of First Rate’s clients, helping them deliver improved service to their clients.

“We are honored to be included among the Inc. 5000 fastest growing companies,” said David A. Stone, First Rate President. “First Rate is dedicated to building relationships by providing the wealth management industry with the best solutions for measuring performance. Our accelerated growth is a testimony to that dedication, the relationships that come from it, and to our strong channel partner relationships.”

The 2009 Inc. 5000, unveiled today on Inc.com, serves as a unique report card on the U.S. economy. Despite the ongoing recession, aggregate revenue among the companies on the list actually increased to \$214 billion, up \$29 billion from last year, with a median three-year growth rate of 126 percent. The Inc. 5000 are responsible for creating more than 1 million jobs since their founding, making the list perhaps the best example of the impact private, fast-growing companies can have on the economy. Complete results of the Inc. 5000, including company profiles and an interactive database that can be sorted by industry, region, and other criteria, can be found at [www.inc5000.com](http://www.inc5000.com).

**Methodology**

The Inc. 5000 is ranked according to percentage revenue growth from 2005 through 2008. To qualify, companies must have been founded and generating revenue by the first week of 2005, and therefore able to show four full calendar years of sales. Additionally, they have to be U.S.-



based, privately held, for profit, and independent -- not subsidiaries or divisions of other companies -- as of December 31, 2008. Revenue in 2005 must have been at least \$200,000, and revenue in 2008 must have been at least \$2 million. The top 10 percent of companies on the list comprise the Inc. 500, now in its 28th year.

### **About Inc. Magazine**

Founded in 1979 and acquired in 2005 by Mansueto Ventures LLC, Inc. ([www.inc.com](http://www.inc.com)) is the only major business magazine dedicated exclusively to owners and managers of growing private companies that delivers real solutions for today's innovative company builders. With a total paid circulation of 712,961, Inc. provides hands-on tools and market-tested strategies for managing people, finances, sales, marketing, and technology. Visit us online at Inc.com. Visit <http://www.inc.com>.

### **About First Rate**

First Rate® provides investment performance measurement and analysis solutions to the wealth management industry. The First Rate Performance Solution is a truly scalable, Web-based suite of applications that allows investment firms to calculate accurate rates of return, efficiently analyze the results of their investment strategy and generate dynamic, boardroom-quality presentations for their clients. As a trusted advisor, First Rate provides its customers with a level of focus, depth and expertise that is truly unique to the industry. Founded in 1991, the Texas based firm is now the preferred performance measurement partner for more than a third of the top U.S. trust institutions. For more information about First Rate, visit [www.FirstRate.com](http://www.FirstRate.com).

Editorial Contact:  
Teyren Brown  
First Rate  
[tbrown@FirstRate.com](mailto:tbrown@FirstRate.com)  
817.525.1883

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