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2007 First Rate Performance Conference, The Heart of Performance

The 2007 First Rate Performance Conference was held March 26-28 at the Westin Stonebriar Resort in Frisco, Texas. This year's conference, themed "The Heart of Performance," had the largest attendance in the event's fourteen year history. It provided an opportunity for First Rate, a performance measurement service provider for the investment industry, to spend time with clients and prospects discussing and demonstrating how First Rate products and services add value to their business.

"The Performance Conference is about sharing ideas that assists our partners to achieve excellence in performance measurement using First Rate solutions. We value this time with our clients and prospects to build relationships and demonstrate how much we appreciate their partnership," said Todd Brunskill, First Rate's Marketing Director. There were a number of sessions covering a range of interests including technology, industry trends, and investment reporting that will assist financial service providers to demonstrate how they add value to a client's investment experience. Sessions were led by First Rate employees and industry experts. Guest speakers included David Spaulding of the Spaulding Group, who gave a presentation on compliance with Global Investment Performance Standards (GIPS), and Howard Getson of Capitologix, who led a roundtable discussion on the challenges of working with hedge funds. In addition, there was a panel discussion on managed account reporting which included First Rate clients, Jeff Clark of Redstone Consulting and Lou Morris of Wachovia.

The conference included discussion of new techniques in the world of investment performance analysis and reporting. Also incorporated were optional breakout sessions centered on concerns of specific types of clients. A new addition to the Performance Conference was the First Rate Kiosk where demonstrations of First Rate Professional, the data engine underlying First Rate's suite of solutions, and First Rate Advisor, the front office tool that allows you to analyze and create "client ready" reports on investment performance, took place.

"The 2007 conference was a great success and we look forward to seeing everyone again in 2008," said Lea Guiler of First Rate's marketing team. That tone was echoed by First Rate President Dave Stone, who said that he hoped attendees gained "new perspectives on the capabilities and scope of resources that First Rate provides."

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First Rate develops investment analysis and performance measurement software, and in addition provides support for back office processing, application hosting, disaster recovery, and consulting services. The First Rate Performance suite of applications provides complete portfolio tracking and reporting solutions specific to the investment professional's needs. First Rate's performance measurement tools assist investment managers in communicating the value of their investment strategies. Starting in 1991, First Rate, a Texas based company, offered one of the first performance measurement systems available in a Web-based environment and is used by more than 125 financial institutions and serves more than 10,000 investment professionals. For more information about First Rate, visit www.FirstRate.com.