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PNC Wealth Management Upgrades to First Rate Advisor

First Rate is excited to announce that PNC Wealth Management, one of America's largest wealth management firms, has upgraded to First Rate's Advisor® performance reporting solution. First Rate Advisor® is a Web-based tool used primarily for analysis and reporting investment performance.

PNC Wealth Management, a First Rate client since 1992, upgraded to Advisor from First Rate Snapshot® and since then has run upwards of 7,000 reports in a single day. "Our clients are the biggest benefactor of First Rate Advisor because they see the end result: boardroom quality reports," said Rick Manning, Manager of Performance Measurement of PNC Wealth Management. Enhanced reporting was the main reason PNC Wealth Management felt it crucial to make the move to Advisor. The upgrade gives PNC Wealth Management the ability to create flexible, dynamic reports based on criteria such as time periods, asset classes and benchmark indices. The First Rate solution supports the user to see real-time modifications to data. This is important to PNC, as it increases the efficiency of creating client reporting. Users no longer are required to wait for edited data to be processed overnight; instead they now see the results of data modifications in a matter of seconds.

"We were pleased that we could assist PNC Wealth Management in enriching their client experience," said Rob Bethmann of First Rate. The change from First Rate Snapshot to First Rate Advisor included many new enhancements including batch reporting which was most significant to PNC Wealth Management. The new batch reporting tool allows PNC Wealth Management to select groups of accounts and reports and order them all concurrently, rather than requesting each one separately. These selections are saved so that the user may repeat the report creation process as required with a click of the mouse instead of reconfiguring each account and report setup, saving PNC Wealth Management significant time in preparing client reports.

"This upgrade provides us with a complete reporting solution that will allow us to better communicate results to clients and save time to focus on our core business of managing investments and relationships," said Tom Bohner, Director of Investment Solutions of PNC Wealth Management. He goes on to call the First Rate-PNC Wealth Management partnership "truly a win-win relationship."

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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

PNC Wealth Management is one of the nation's largest wealth managers with more than 150 years of money management expertise. PNC Wealth Management provides services and advice to individuals, families, businesses and non-profit organizations.

They offer full-service brokerage through Hilliard Lyons, Inc. and services to ultra high net-worth clients through their Hawthorn division.