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First Rate Announces Alliance with Dimension Capital Management

First Rate is pleased to announce that Dimension Capital Management of Miami, Florida has selected First Rate as their performance measurement solution partner. Working together, the two firms will implement changes designed to save Dimension Capital time to calculate and verify portfolio performance while improving their ability to analyze and report on investment performance to their clients.

“Dimension Capital is known for delivering institutional-quality investment management with personalized service,” said First Rate Marketing Director Todd Brunskill. “We are honored that they have chosen us to help them do this.”

Dimension Capital selected First Rate for their performance calculation and reporting solution as well as their application services provider (ASP) for the next five years. Dimension Capital will utilize the First Rate Performance Suite which includes a powerful performance engine, composite management system, data validation processing and reporting capability.

“The combined solution of First Rate software and application hosting was a great solution for Dimension Capital” said Jeff Kunkel, managing director of First Rate operations.

“Dimension will be able to leverage our outsourced technology solution to allow them to focus on client service and relationships.”

In selecting First Rate ASP, Dimension Capital will have their data hosted on servers located at multiple First Rate data centers. This will allow Dimension Capital to further leverage the performance capabilities and technical expertise of First Rate. They will access and analyze the data from their own offices, using First Rate Advisor which is a web-based performance reporting tool that offers customizable client-ready reporting with 3 clicks of the mouse. This will empower them to quickly and efficiently communicate investment results to their clients. In addition, Advisor has sophisticated drill-down capabilities that assist the investment manager in analyzing the performance of their portfolio and the attributes of the portfolio.

“We’re most impressed with the reporting and flexibility of the tools,” said Albert Marques of Dimension Capital. “Replacing the existing, labor-intensive spreadsheets and their associated inefficiencies will change the way we do business for the better. The interest of the First Rate team in getting to know us and helping us was another big factor in our choice of First Rate.”

“The partnership is an ideal fit,” said Dave Stone, First Rate’s President. “Dimension Capital’s emphasis on personalized client service mirrors First Rate’s own client-centered philosophy. We intend to give them the same superior service that they provide to their own clients, and we look forward to many years of success in our partnership with Dimension Capital Management.”

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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

Dimension Capital Management (DCM) is a wealth management and investment counseling organization established to meet the unique financial service needs of U.S. and non U.S. institutions, families and individuals. The firm provides a broad range of asset allocation and investment advisory services on a fee-only basis that assures its clients of the firm’s objective and utmost commitment to each client’s investment success. In addition to providing investment and asset allocation advisory services, DCM offers a full range of private family office services to provide for the special needs of high net worth families and institutions.