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SunGard's Charlotte[®] to Deliver Integrated Performance Measurement Using First Rate[®]

SunGard is pleased to announce that it will integrate the performance measurement reporting capabilities of First Rate with SunGard's Charlotte trust accounting solution for community financial institutions, trust companies, family offices and law firms, and non-profit organizations.

By integrating with First Rate, Charlotte will provide customers with a single platform for trust accounting and returns calculated in a Global Industry Performance Standards (GIPS) compliant manner, offering a robust and efficient method for communicating performance results on clients' accounts.

"Charlotte's integration with First Rate will provide our customers with more flexibility in handling basic to complex performance measurement requirements," said Marilyn McLuckie, executive vice president and general manager of SunGard's Charlotte business unit. "Because First Rate's performance results will be fully integrated with Charlotte, customers' data will be accessible on a single platform consolidating both portfolio trust accounting and performance related results."

Charlotte will seamlessly integrate with First Rate's web-based performance reporting tool, First Rate Advisor[®]. Charlotte customers will have the ability to establish different tiers of performance measurement reporting for their accounts based on specific client needs, allowing them to produce a variety of performance measurement reports.

"First Rate offers a flexible, tiered solution that will assist Charlotte customers in matching performance with client needs and access a variety of performance reporting solutions," said Craig Wietz, managing director, service bureau at First Rate. "Charlotte customers have the ability to have unlimited segmentation, which allows for performance results that empower them to effectively communicate the results of the investment managers' strategy."

SunGard is a leading provider of wealth management solutions that helps financial advisors and investment managers grow their businesses by meeting the needs of their mass affluent and high-net worth clients, expanding client relationships and gaining assets, while fulfilling increasing regulatory demands. SunGard provides an integrated suite of services and best-of-breed point solutions for new account opening, financial planning, asset allocation, surveillance and suitability, portfolio management, unified managed account programs, trade execution, asset management, custody and trust accounting. SunGard's compliance solutions help wealth managers mitigate risk and automate trade supervision and code of ethics program.

First Rate provides investment analysis and performance measurement solutions for financial services providers which include; software, support for back office processing, application hosting, disaster recovery, and consulting services. First Rate assists their partners with communicating the value of their investment strategy through solutions that incorporate web-based portfolio tracking, daily calculation, and single or multi-currency reporting. Starting in 1991, the Texas-based First Rate was one of the first performance measurement systems available in a Web-based environment, and is used by more than 125 financial institutions worldwide and serves more than 10,000 investment professionals. To learn more about making First Rate **Your Performance Solution Partner**, please visit www.FirstRate.com.

For more information on how your organization can take advantage of First Rate's performance measurement capabilities, contact your SunGard Relationship Manager, email cltcsr@sungard.com, or plan to attend a WebEx session scheduled on 7/30 @ 11:00 am (Eastern time) and 7/31 @ 1:00 pm (Eastern time).