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First Rate Announces Partnership with Bluffview Wealth Management, L.P.

First Rate is pleased to announce that Dallas-based wealth management firm Bluffview Wealth Management, L.P. has chosen First Rate to be their performance measurement and reporting solutions partner. Bluffview Wealth Management will be utilizing the First Rate Performance Suite as well as First Rate's hosting and back office services.

"We're excited about the possibilities this relationship is opening up to us," says Mike Goodrich, Managing Director of Bluffview Wealth Management. "First Rate's solutions will allow us to get reports out to our clients quickly, and they provide the scalability we need to handle our anticipated growth in the coming years."

Bluffview Wealth Management's previous performance reporting process was very time-intensive, and they needed a solution that would allow for on-line analysis of client portfolios. With First Rate's Performance Suite they now have drill-down capability for online analysis and can create reports that are specific to their client needs. In addition, time-saving report preparation features will allow Bluffview to spend less time running reports and more time visiting with clients.

Bluffview selected a total outsource solution that utilizes the licensing, ASP expertise, experience and knowledge of the First Rate back office team, as well as the security of First Rate's data centers. The end result is maximized data maintenance resources with a minimum of overhead.

"Bluffview Wealth Management is known for the comprehensive financial services they offer to companies, high-net worth individuals and innovative entrepreneurs," says Craig Wietz, Managing Director of Service Bureau for First Rate. "First Rate is very proud to have them as a client, and looks forward to leveraging our resources to help them grow their business as effectively as possible."

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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 195 financial institutions and serves more than 10,000 investment professionals. For more information about First Rate, visit www.FirstRate.com

Bluffview Wealth Management is a wealth management firm based in Dallas, Texas which provides comprehensive investment management and wealth planning advisory services. The firm is a full-service independent wealth management firm that caters to high net-worth and ultra high net-worth individuals and families. The Firm provides investment advisory solutions and wealth management advice to new and experienced entrepreneurs including: liquidity and diversification strategies; alternative investments and lower volatility investment strategies; insurance and charitable wealth planning techniques; and planning to minimize wealth accumulation risks. Bluffview Wealth Management through its affiliates is a licensed broker-dealer, registered investment advisor, and a member of Financial Industry Regulatory Authority, (FINRA) and the Securities Investor Protection Corporation (SIPC).