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First Rate Establishes Strategic Partnership With ByAllAccounts

Relationship to aggregate held away accounts in order to enhance data reporting for clients

Arlington, Texas (April 21, 2008) - First Rate, a provider of investment analysis and performance measurement software and services, announced today that it has signed a partnership agreement with ByAllAccounts, a provider of reconciliation-ready data to investment management and advisory firms. Per the agreement, ByAllAccounts will consolidate asset information from different custodians into one data file for First Rate, enabling its clients to improve the service they provide their account holders through the ability to deliver holistic portfolio reporting.

“This partnership allows us to better serve our customers, and as a result, provide them an opportunity to build their business,” said Dave Stone, founder and president of First Rate. “The data aggregation and normalization ByAllAccounts is providing gives our clients a competitive advantage because they can now deliver more robust wealth reporting, even with accounts held at different custodians. If a customer chooses, ByAllAccounts can pull data from multiple custodians and then place it into one load file for First Rate, allowing all results to be reported from one location. This relationship has great potential to assist our clients to attract more customers because they will have the ability to provide a comprehensive wealth overview for all assets a client may have.”

“First Rate has built a strong reputation for its performance measurement and reporting solutions,” said Bill Carney, of ByAllAccounts. “Combining their expertise with our ability to aggregate account data from multiple sources will enable First Rate to provide even better solutions for their clients. We look forward to working with First Rate to make the most of this relationship.”

ByAllAccounts will consolidate and format account data—including updated balances, holdings and transaction history—for the full range of managed and “held-away” accounts, and then transmit that data in one file to First Rate. First Rate will load the data into its performance measurement and reporting solution to calculate, analyze and report rates of return for its customers, who will then be able to provide total wealth reporting for their clients.

Currently, First Rate’s Service Bureau division offers manual entry of statements for held away accounts. As a result of the partnership with ByAllAccounts, manual entry of non-custody accounts can be eliminated, resulting in an estimated cost savings of 80 percent or more in some cases, while also shortening delivery times by up to several days.

“We constantly look for ways to create and add value for our clients,” said Craig Wietz, General Manager of the First Rate Service Bureau. “This partnership, by making what we do less costly, more efficient and of greater value, will be important for our continued growth in the coming years.”

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About First Rate

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

About ByAllAccounts

Founded in 1999, ByAllAccounts delivers reconciliation-ready data to investment management and advisory firms. Using innovative expert technology, we provide unparalleled access to reliable, accurate financial account data from thousands of custodians and enable efficient and timely account reconciliation, performance analysis and consolidated reporting. We help our customers build stronger, more profitable relationships by providing timely, personalized levels of service and better advice based on a more complete understanding of their clients' assets. For more information about ByAllAccounts, Inc. solutions, please call 781.376.0801, email info@byallaccounts.com, or visit www.byallaccounts.com

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