

**FOR IMMEDIATE RELEASE****Introducing NorthStar Client Acquisition Solution**

*Solution Automates Client Acquisition Process,  
Generates Personalized Proposals and Improves Client Close Rates*

**San Francisco, CA – Oct 30, 2007** – NorthStar Systems International, a leading provider of wealth management software to financial services institutions, today launched the **NorthStar Client Acquisition Solution**, best-in-class investor profiling and proposal management software designed specifically for wealth and asset managers. Unlike canned or un-integrated proposal systems, the NorthStar Client Acquisition Solution streamlines the entire client acquisition process by building powerful revenue-generating tools into the advisor's daily workflow, resulting in an average of 60% reduction in proposal generation time per client.

With the wealth management industry set for an unprecedented 30% annual growth rate over the next few years according to a recent PricewaterhouseCoopers report, firms are struggling to gain competitive advantage, as non-traditional wealth management providers such as discount brokers, insurance companies and independent advisors go head to head with private banks, trusts and family offices. At the same time, financial advisors are being pressured to increase their volumes and margins without the technology to automate and tailor prospect material. With competition for new assets around every corner, wealth and asset management firms must differentiate themselves from the crowd or risk losing market share. It is, therefore, no surprise that 83% of advisors in a Curian Capital survey say their number one goal this year is to attract more clients with greater assets.

Available on-premise or on-demand, the NorthStar Client Acquisition Solution enables firms to generate personalized proposals cost-effectively, freeing advisors from time-consuming administrative tasks so they can focus on closing more business and increasing assets under management. The Solution provides:

- **Professionally designed, firm-branded proposals**, each one tailored to the affluent client's own investment goals and financial needs, while enforcing compliance requirements
- **Centralized profiling** that leverages each client's investment risks and constraints across all workflows, including planning and asset allocation

"Competition for new assets is intense," says Bob Skea, chief operating officer, worldwide field operations, NorthStar. "The NorthStar Client Acquisition Solution helps firms showcase their value by delivering best-of-breed technology for acquiring clients quickly and simply," says Skea, "and the payback is typically achieved in less than a year and could be as quick as months."

"Firms are grappling with the double hit of rising client acquisition costs and fierce competition for top talent," says Robert J. Ellis, senior wealth management analyst with Celent. "Firms that want to increase market share should seek out technology solutions that help them attract new assets under management, retain producers while growing their compensation, and improve operational efficiencies," says Ellis.

For more information on how the NorthStar Client Acquisition Solution can address your firm's needs, call 1-866-916-8524 or go to [http://www.northstar.com/solutions/client\\_acquisition.htm](http://www.northstar.com/solutions/client_acquisition.htm)

**About NorthStar Systems International**

NorthStar's enterprise-class solutions, delivered either on-premise or on-demand, enable firms of all sizes and their advisors to dramatically improve productivity, accelerate revenue growth, and drive

profitability. NorthStar's innovative suite of pre-packaged wealth management solutions include Client Acquisition, Client Reporting, Product Catalog and Compliance. For more information about NorthStar, its premier clients and award-winning offerings, visit [www.northstar.com](http://www.northstar.com).

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**Media Contacts:**

Patty Buchanan  
FastLane  
973-476-2144  
[pbuchanan@fast-lane.net](mailto:pbuchanan@fast-lane.net)

Christi Weidling  
NorthStar  
415-344-6140  
[cweidling@northstar.com](mailto:cweidling@northstar.com)