NORTHSTAR

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FOR IMMEDIATE RELEASE

NorthStar Introduces Several Innovations for Wealth Management Firms

NorthStar 5.0 further enables firms to profitably grow wealth management business

San Francisco, CA – July 25, 2007 – NorthStar Systems International (NorthStar), the leading provider of wealth management software to financial services institutions, today introduced NorthStar 5.0, the latest version of its award-winning advisor desktop. By streamlining wealth workflows, enabling advisors to better manage clients and products, and leveraging CRM data, NorthStar 5.0 fundamentally improves the way advisors Acquire, Plan, Manage and Report on client and prospect wealth. As a result, both advisors and firms can exceed client expectations and increase assets under management.

Available on-premise or on-demand and as a suite or in modules, the scalable software solution offers banks, trusts, broker-dealers, family offices and other financial services providers a number of industry firsts that significantly advance the efficiency and effectiveness of their wealth management businesses:

- First Straight Through Processing for Wealth Managers™
- First enterprise-class, active Client Hierarchy
- First firm-wide Product Catalog, spanning all product types
- First entitlement-driven integration with firm's Customer Relationship Management (CRM) system

"NorthStar 5.0 represents the industry's most robust, most progressive, best practices-driven 360-degree client wealth management platform, providing advisors with seamless, automated access to the tools and information they need to provide high quality, compliant investment services," said Collin Cohen, president, NorthStar. "NorthStar 5.0 is a major advancement—the combination of our pioneering Client Hierarchy, an extensive yet easy to use Product Catalog, and flexible entitlements approach allows advisors to multiply the amount of quality time they can spend with clients and prospects."

NorthStar 5.0 world-class innovations include:

First Streamlined, Straight Through Wealth Management
By automating and streamlining the core advisory workflow process, NorthStar 5.0's Straight Through Processing for Wealth Managers enables advisors to decrease their administrative efforts by up to one-third. Specifically, NorthStar 5.0 automatically pulls investor profiling information into every step of the wealth lifecycle, such as asset allocation, investment proposal and portfolio construction, thereby eliminating data re-entry, improving advisor productivity, and ensuring suitability of client portfolios.

First Enterprise-Class, Active Client Hierarchy
With this release, NorthStar has extended its flexible services-oriented architecture to include the industry's first, enterprise-class active Client Hierarchy, where advisors dynamically navigate a graphical, hierarchical representation of a client's financial network including relationships, portfolios, accounts, and products. The Client Hierarchy enables advisors to focus on real decision-makers and take immediate action through NorthStar's signature 360-degree client views.

First Firm-Wide Product Catalog
With this release, NorthStar helps advisors become "solution sellers" by providing the industry's first firm-wide product catalog where advisors can access banking, insurance and alternative investment vehicles. The Product Catalog includes a unique Product Finder and Product Cart where advisors can

locate, track and compare financial instruments they are entitled to sell. Advisors become instant product experts by uploading talking points and other marketing materials. Plus, the NorthStar Product Catalog is always up-to-date given its ease of administration and integration to market data.

First Entitlement-Driven CRM Integration

NorthStar 5.0 seamlessly passes client information, client service events, entitlements, and security policies already set up in the firm's CRM system to NorthStar. Once CRM is linked to NorthStar 5.0, advisors no longer need to be trained on disparate applications nor re-key client data. They can focus on converting and managing prospects and clients.

Other NorthStar 5.0 features include: configurable risk questionnaires, more personalized investment proposals, richer portfolio analytics to identify compliant, suitable products to recommend, and enhanced reporting.

About NorthStar Systems International:

NorthStar is the leading provider of wealth management software to financial services institutions. It has a growing list of clients across market segments and sizes such as Charles Schwab, Legg Mason, Merrill Lynch, Wachovia, BlackRock and several national banks. NorthStar products, delivered either on-premise or on-demand, enable firms and their advisors to dramatically improve productivity, enhance client relationships and reduce compliance risk. Please visit the pioneer in wealth management solutions at www.northstar.com.

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