

## FOR IMMEDIATE RELEASE

### NorthStar Introduces Integrated Wealth Planning Solution to Meet the Demands of Financial Advisors

New York, NY- March 09, 2009 - NorthStar Systems International, a leading provider of wealth management software solutions, today announced the release of its new ***NorthStar Integrated Wealth Planning Solution***.

The ***NorthStar Integrated Wealth Planning Solution*** has been recognized for its “advanced technology” as a leading “integrated planning, implementation and monitoring platform” by Celent in its November 2008 planning research study. The Solution will be a major functional capability of NorthStar’s 6.0 release due in the second quarter of 2009.

***The Integrated Wealth Planning Solution*** is NorthStar’s planning methodology designed specifically for wealth advisors within the context of their daily workflows. The wealth management industry has historically used standalone financial planning, asset allocation, or portfolio accounting applications as specific point solutions and/or point-in-time solutions. With this release, NorthStar offers a more focused solution to integrate financial planning directly into the portfolio planning, implementation, servicing, reporting and monitoring processes. This will enable advisors to maintain the context of the financial plan throughout the advisory lifecycle continuum.

With the ***NorthStar Integrated Wealth Planning Solution***, NorthStar has addressed a key advisor challenge – how to integrate the three key constituencies of providing advice:

- Financial Plan: Providing a financial plan by modeling the cash-flow requirements associated with a client’s goals
- Client Hierarchy and Wealth Profile: Modeling and implementing the ownership structures and account registrations associated with the contractual requirements of a client relationship or a household
- Investment Policy: Allowing the capture of investment strategy and policy criteria of a portfolio leading to portfolio implementation, reporting and monitoring

“Our solution empowers an advisor to create a financial plan integrated within a client-focused workflow, including the implementation of portfolios and monitoring of agreed-to investment policy constraints. In doing so, we’ve enabled advisors to truly meet the needs of their clients and scale their business to the next level in a more cost-effective manner.” **William Entwistle, SVP Sales and Marketing, NorthStar.**

Available on-premise or on-demand, the NorthStar Wealth Planning Solution enables firms to generate the following types of wealth plans depending on client needs:

- Asset Allocation Planning
- Goal Planning
- Education Planning
- Major Purchase Planning
- Pre-Retirement Planning
- In-Retirement Planning
- Total Return Planning

Furthermore, the NorthStar Integrated Wealth Planning Solution allows for the creation and monitoring of an Investment Policy Statement aligned with a client’s goal.

### About NorthStar Systems International

NorthStar is a leading provider of wealth management software that enables firms to dramatically improve productivity and drive profitability. Industry leaders use NorthStar to automate and streamline

their wealth management workflows with NorthStar Desktop, NorthStar Client Acquisition Solution, NorthStar Client Reporting Solution, NorthStar Compliance Solution, and NorthStar Product Catalog Solution. For more information about NorthStar, its premier clients and award-winning software, visit [www.northstar.com](http://www.northstar.com).

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