

# FundQuest

A BNP PARIBAS company 

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## **FundQuest Launches New Income-Optimizing Portfolios**

Expanding its Retirement Income Solutions for Institutions

**BOSTON, Mass January 23, 2006** – FundQuest, a leading provider of wealth management solutions for financial institutions, has announced the upcoming availability of a new series of income-optimizing portfolios. The new portfolios address an investor's need for income without forgoing the potential for capital appreciation. FundQuest designed the portfolios to meet the growing marketplace demand for products that address the retirement income needs of investors.

The new portfolios were constructed using a combination of FundQuest's rigorous investment selection process and the results of proprietary research by FundQuest's Investment Management and Research Team. The Team evaluated which investment categories, when combined together, were most likely to produce sustainable income with a reasonable level of investment return.

"By combining the appropriate mix of income producing investments such as REITs, high yield bonds, emerging debt, and dividend producing equities, we can deliver a well diversified portfolio with the benefits of lower correlation," explained Tim Clift, Chief Investment Officer at FundQuest. "We believe that these portfolios will be of particular interest to investors seeking a prudent approach to long-term investing in retirement."

The portfolios will be an additional option for FundQuest's model-driven advisory programs and include four risk based allocation options. These additions expand FundQuest's offering of model portfolios and address very targeted investor needs. Portfolio recommendations are made in consultation with an advisor and are based upon the risk tolerance, tax sensitivity, income needs, and potential retirement duration of the investor.

The introduction of these new portfolios is another example of FundQuest's commitment to helping institutions target the emerging retirement income market. FundQuest has been a pioneer in the development of enterprise-level solutions to help institutions manage retirement income distribution through the development of its Retirement Management Services platform launched in October. This turnkey program combines a partner institution's investment and product platform with best practices for the administration of retirement assets and income, and is backed by training, education, sales, and marketing support.

"With the coming retirements of the Baby Boom generation, reduced access to pensions, and increased dependence on personal savings, investment programs that maximize income distribution are more important than ever," said Bob Del Col, FundQuest President. "Institutions are actively pursuing solutions to meet the needs of this explosive market segment. We realize that FundQuest is well-positioned to help institutions meet these opportunities with the right products and platform delivery solutions."

### **About FundQuest**

Founded in 1993, FundQuest ([www.fundquest.com](http://www.fundquest.com)) is a leading provider of turnkey managed investment account solutions. With more than \$12 billion under management and administration, the company serves many of the world's most prominent financial institutions. FundQuest delivers a flexible menu of wealth management solutions that support: mutual fund advisory, separately managed accounts, fee-based brokerage, unified managed accounts, retirement, trust, annuities, exchange-traded funds, and alternative investments. The company's open technology architecture, objective investment management services, and sales and marketing resources help financial advisors to address their clients' important financial goals. FundQuest is wholly owned by BNP Paribas.

### **About BNP Paribas**

**BNP Paribas** ([www.bnpparibas.com](http://www.bnpparibas.com)) is a European leader in banking and financial services, with a significant and growing presence in the United States and leading positions in Asia. The most profitable bank in the Euro zone, it has a presence in 85 countries with close to 100,000 employees. The group enjoys key positions in Corporate and Investment Banking, Private Banking & Asset Management, Insurance, Securities Services and Retail Banking.