FundQuest
A BNP PARIBAS company

## FundQuest Launches Fact-Sheets-On-Demand for Funds, ETFs, and Model Portfolios

**Boston, MA- March 24, 2009-** FundQuest has launched new technology that enables advisors to create investment fact-sheets on-demand with a single-click. FundQuest, a leader in managed account solutions, provides financial advisory firms with technology-based productivity tools, back-office administrative services, client performance reporting, and investment research.

This new service significantly reduces the time and effort advisors have to devote to generating timely detailed information for their clients. Today's investors are particularly focused on information transparency. FundQuest keeps the fact-sheets current by uploading data from major providers.

FundQuest's fact-sheets include the following critical information: investment strategy summary, style category, market capitalization, key financial ratios, expense ratio, trailing yields, top ten holdings, holdings by major sector, foreign holdings by global region, and performance for up to seven different time periods from one month to ten years, compared to the category benchmark. Fact-Sheets-On-Demand are available for these categories: Equity, Fixed Income, Balanced, ETF/Equity, ETF/Fixed Income, and model portfolios.

The ability to instantly generate a fact-sheet for a model portfolio program is an important feature. Model-based mutual fund portfolio programs, which combine multiple funds for diversification, are a major component of advisors' offerings.

The technology provides generates fact-sheets via a single-click on an individual client's profile page or via FundQuest's automated proposal module. Fact-sheets can be generated for multiple tickers/CUSIPs on the Fact-Sheet Ticker Search page.

According to Lincoln Ross, FundQuest's Director of Technology, "Advisors told us it was cumbersome and time-consuming to generate details on the specific investments used by or recommended for each individual client. This service makes fact-sheet creation a fast, fully integrated part of an advisor's sales and service process. Advisors really appreciate not having to bounce out to other information sources where they then have to re-input client portfolio data."

### About FundQuest

FundQuest is the best partner to help financial institutions and their financial advisors to grow their business and control expenses via outsourced technology, back-office operations, and research. Services are delivered via partnerships with over 130 financial institutions including RIAs, insurance companies, banks, trust companies and independent broker-dealers.

The combined US and European operations of FundQuest have $64 billion in assets under management and administration. Services are offered in the US through FundQuest Incorporated, a Registered Investment Advisor founded in Boston, MA in 1993.

FundQuest is the most innovative and flexible partner with the best overall support for advisors and management. The company's advanced technology, objective investment research services, high quality back-office operations, and sales support services help financial advisors to address their clients' important financial goals.

Financial institutions leverage FundQuest's flexible menu of wealth management solutions to provide: unified managed accounts, mutual fund advisory, separately managed accounts, income portfolios, trust services, annuities, exchange-traded funds, and alternative investments.

FundQuest is owned by BNP Paribas, one of the world's largest and most stable financial institutions. More information at: www.fundquest.com/usa

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