

## PRESS RELEASE

### Bedel Financial Consulting Upgrades Client Communications with Assette Indianapolis investment firm uses Assette software to enhance client reporting

**BOSTON, MA, May 30, 2013** - Assette, the leading provider of cloud-based client reporting solutions to the investment industry, announced today that Bedel Financial Consulting of Indianapolis, Indiana has begun using Assette technology.

Assette makes it easy for investment firms to use data from portfolio accounting systems to efficiently produce customized, professional client reports and presentations. At Bedel Financial, Assette will process data from Schwab PortfolioCenter®.

"Many investment firms require a more sophisticated reporting system today versus what they needed just five or ten years ago," said Marc Filipkowski, Director of Sales and Business Development at Assette. "Many firms now realize the way they communicate with investors via reports, presentations, or online can represent either a competitive advantage or disadvantage. Upgrading technology so you can produce client communications quicker and better is clearly the way the industry is trending."

The Bedel Financial deal, coupled with other agreements Assette has recently announced, demonstrates clear momentum in the industry of finding ways to improve client communications and reporting.

"We looked at Assette a while ago and liked what we saw. However, we thought we could solve our reporting challenges using our portfolio accounting system," said Ryan Collier, Senior Portfolio Manager. "In the end, we came back to Assette as they demonstrated a clear understanding of our needs and an ability to solve our issues through their technology. Now we have the best of both worlds - a great reporting application integrated with a great accounting system. Furthermore, it was easy and painless to get started with Assette."

Bedel Financial Consulting was founded in 1989 and offers fee-only comprehensive financial planning and investment management services to its clients.

#### About Assette

Assette makes client reporting easy. Assette allows investment firms to focus on serving clients instead of mundane reporting work. Automatically push data from Advent Axys®, Advent Portfolio Exchange®(APX) or Schwab PortfolioCenter®, and augment with information from FactSet®, BondEdge® or Excel® to easily generate professional quarterly reports, client meeting presentations, and provide online account access. With Assette, providing professional client reports takes only a few clicks of a mouse. For more information, please visit [www.assette.com](http://www.assette.com), email [sales@assette.com](mailto:sales@assette.com) or call 866.723.6161.

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