

## PRESS RELEASE

### Circle Advisers to Use Assette's Client Reporting Software NYC wealth manager the latest to invest in technology and benefit from new onboarding process

**Boston, MA - March 4, 2013** - Assette, the leading provider of cloud-based client reporting solutions to the investment industry, announced today that Circle Advisers, Inc. of New York City has implemented Assette software.

Assette makes it easy for investment firms to use data from portfolio accounting systems to efficiently produce customized, professional client reports and presentations. At Circle Advisers, Assette interfaces with Schwab PortfolioCenter®. Furthermore, as a result of ongoing product enhancements and implementation improvements, Assette was able to onboard Circle Advisers in record time.

"Based on a strong fourth quarter at Assette, it's apparent that many investment firms continue to prioritize client reporting and evaluate ways to do it better - both from an operational standpoint and a client service/investor benefit standpoint," said Marc Filipkowski, Director of Sales and Business Development at Assette. "Moreover, enhancements at Assette over the past 18 months have significantly reduced the onboarding time from about 6 months to 6 weeks."

The Circle agreement, as well as other deals Assette will announce soon, demonstrates an investment industry focus on solving the client reporting challenges that exist at many firms.

"Partnering with Assette allows us to tell our story better by providing enhanced client reports to our investors. It also lets us do so in less time," said Jeff Golden, Financial Planner at Circle Advisers. "Assette made the entire process easy. We signed contracts in early December, and even with normal holiday downtime, we were up and running by mid-January."

Founded more than 30 years ago, Circle Advisers is an SEC-registered investment advisory firm that provides comprehensive, custom wealth management solutions.

#### About Assette

Assette makes client reporting easy. Quickly creating presentations and reports is simple with Assette's client reporting software, built specifically for investment management firms. Save time, eliminate errors, and make reports look great. Assette's software accurately feeds data from multiple systems—Advent Axys®, APX®, Schwab PortfolioCenter®, FactSet®, BondEdge®, and Excel®—into your client presentations, sales pitch books, monthly and quarterly reports, and client portal.

Please contact Assette today to find out the benefits of automating client reporting.

Client reporting has never been this easy.  
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