



# Press Release

## INNOVEST SYSTEMS AND PRIMA CAPITAL FORM STRATEGIC ALLIANCE

*Combining the Power of Prima Capital's PrimaGuide® and Innovest's InnoTrust System Gives Trust and Investment Professionals a Real-Time Competitive Advantage*

**NEW YORK, NY and DENVER, CO, September 14, 2009** – Innovest Systems, LLC, a financial technology firm specializing in trust accounting and wealth management solutions, and Prima Capital Holding, Inc., a leading provider of investment research, technology and portfolio design to the wealth management and retirement industries, today announced that they have formed a strategic alliance. Together, Prima Capital and Innovest Systems will provide trust and investment professionals the ability to leverage Prima Capital's web-based investment research tool, PrimaGuide, and Innovest's real-time trust system, InnoTrust, to perform manager research as well as submit portfolio allocation instructions. In addition, users of the combined offering will also have access to Prima Capital's AllocationGuide™ to generate sophisticated state-of-the-art proposals for clients and prospects.

This alliance will enable users to establish model portfolios and to deliver those models to the InnoTrust platform. Users can also set criteria for automatic rebalancing based on threshold and minimum trade settings. Adjustments to model portfolios can also be fed directly to the InnoTrust system. Client portfolios can be set to rebalance automatically or at the user's discretion to mimic the changes to the model.

William Thomas, Innovest Systems' chief executive officer, said, "We are delighted to join forces with Prima Capital to deepen our offering to wealth management professionals. Shifting demographics are fundamentally changing how firms compete effectively in the wealth management sector. The ability to offer a trust-enabled wealth management solution is becoming ever more important. Integrating these services into a comprehensive offering can set a firm apart in a difficult and dynamic marketplace. In many cases, integrating trust capabilities and investment advisory services is the 'missing link' for firms seeking to holistically manage their clients' total wealth."

Gib Watson, president of Prima Capital, said, "Prima is pleased to collaborate with Innovest in order to satisfy the trust professional's need for independent and objective research on their clients' managed investments. In light of recent economic and market turmoil, risk management is the order of the day for client portfolios. Innovest's leading trust accounting and reporting technology will complement our research and advisory capabilities, allowing advisors to design portfolios with care and then implement and monitor with ease."

Prima Capital is a Matrix Financial Solutions affiliate company. Other affiliates under the Matrix Financial Solutions umbrella are Matrix Settlement and Clearance Services, LLC; MG Trust Company, LLC; MG Advisory Services, LLC; MSCS Financial Services, LLC; Matrix Communications Technologies, LLC; and Optech Systems, Inc. Both Matrix Financial Solutions and Innovest have indirect common

ownership through the principals of Bluff Point Associates, Inc, which is a private equity firm focused on financial services technology and processing.

### **About Innovest Systems**

Innovest Systems, LLC is a financial technology firm that provides technology-driven solutions to trust and wealth management companies. With tens of trillions of dollars worth of assets transferring between generations over the coming decades, Innovest's flagship product, InnoTrust, is designed to deliver a secure, integrated, real-time system offered in an Application Service Provider (ASP) environment. Innovest's technology is designed to meet the needs of smaller independent trust and wealth management companies, as well as the world's largest global financial services firms. Innovest is headquartered in the financial district of New York City. For more information about Innovest Systems, visit [www.innovestsystems.com](http://www.innovestsystems.com).

### **About Prima Capital**

Prima Capital, a Matrix Financial Solutions affiliate company, is a leading provider of investment research, technology, and portfolio design to the wealth management and retirement industries. Prima conducts objective, institutional-quality research and due diligence on separately-managed accounts, mutual funds, ETFs and alternatives. This information is delivered to investment professionals' desktops via Prima's powerful investment research application, PrimaGuide<sup>®</sup>, its investment proposal system Prima AllocationGuide<sup>™</sup>, and RetireTool(k)it, an advanced technology with all the tools a retirement plan advisor or broker needs to serve a 401(k) plan sponsor. Prima also offers asset allocation services, portfolio construction strategies and multi-manager portfolios. Prima's Target Risk Portfolios bundle the best managers from Prima's unbiased research into a series of globally diversified, professionally managed portfolios. Prima also serves as Portfolio Strategist for the RetireFocus Funds, a series of target date collective investment funds sponsored by MG Trust Company, LLC. For more information, visit [www.primacapital.com](http://www.primacapital.com).

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