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Total Rebalance Expert® (TRX®) and Back Office Support Service (BOSS) announce a new service for advisors!

San Diego, CA – February 16, 2010 – Two best of breed providers have teamed up to offer enhanced services to Investment Advisors who want to streamline the process of portfolio management and account rebalancing, all in a web-based environment.

BOSS has been recognized as a leading provider of web based portfolio management outsourcing services. “Now, we are excited to announce the addition of TRX account rebalancing to our web platform”, says Mike Kelly, President and CEO of Back Office Support Service. “The combined time and financial savings will provide huge rewards for advisors looking to streamline their operations. With TRX and PMS data in a hosted web-based environment, advisors will have seamless integration as well as real-time access from anywhere.”

TRX automates advisors’ most time-consuming, error-prone task: rebalancing. Because it was developed by leading financial advisors who are CPAs, it also recommends specific investment account trades and methods to maximize client savings through tax-efficient strategies. All proposed transactions, by design, avoid short-term gains, minimize capital gains, avoid redemption fees, and avoid wash sales. With built-in tax efficiency and location optimization, advisors increase gross and net returns for clients.

With TRX, precious time is freed up for meeting with current and potential clients—activities that are crucial for advisors still pinched due to the stock market downturn and continued volatility. TRX CEO Sheryl Rowling is thrilled to see advisors rallying behind the practice-improving tool, which has earned “third party provider” status from Schwab Performance Technologies®. As a seasoned advisor, she knows how powerful these savings really are for advisors in this challenging economy:

“With less time on their hands, greater demands, and less revenue, advisors can’t find a way to do the one thing they desperately need to do: market their firms to bring in new business,” says Rowling who is still a partner in a wealth management firm. “The best solution for growth is to add capacity. TRX and BOSS add measurable time in your day without having to hire more people.”

About Total Rebalance Expert (TRX): TRX software, available commercially in 2009, is a rebalancing software solution designed to bring portfolio management to a new level with features such as Analysis Expert and Tax Loss Harvesting, both at the touch of a button. The speed at which meaningful decisions can be made enables Advisors to significantly grow their practices because they can serve more investors, delivering very high-quality services. Learn more at www.TRXpert.com

About Back Office Support Service (BOSS): Since 1996, BOSS has provided expert outsourcing solutions for independent investment advisors. Services include daily data management, web hosting, reconciliation, performance reporting, fee billing and other support services. BOSS also offers consulting and project work for database conversions and one-time projects. Learn more at www.thebackoffice.biz

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