JUNXURE

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LEADING CRM DEVELOPER NOW SUPPORTS ADVISORS WITH COMBINATION OF CONSULTING, TRAINING AND SOFTWARE
New Junxure Web Site Reflects Evolution of Business

Raleigh, North Carolina, 24 August 2011 — Junxure has introduced a new web site—www.junxure.com—that reflects the company's evolution from software provider to full-service practice improvement firm. Junxure clients now streamline operations and grow their practices with a combination of industry-leading software and support, robust practice management consulting and intensive training.

"As president of my own wealth management firm, I've led the development of a software suite that thinks like an advisor," said Junxure president Greg Friedman. "But after many years running my own firm, I know that software is just one piece of the puzzle. Our consulting and training services address the process modifications and human elements that help our customers transform their practices."

Junxure customers now benefit from integrated packages that combine these three elements:

1. PRACTICE MANAGEMENT CONSULTING

Junxure is the only CRM provider that offers advisors in-depth practice management consulting. Junxure consultants help advisors achieve clarity about their practice goals and vision for their operations. Then they provide them with practical guidance on how to run and grow the firm. Finally, they work with advisors to deploy Junxure software to meet the specific needs and processes of the firm. All Junxure consultants come from a wealth management background, including using Junxure in their own wealth management firms. They speak in the language of financial advisors, rather than the arcane language of technology. They offer high levels of personal attention and customization of Junxure to help advisors make sweeping improvements to their business.

2. INTENSIVE TRAINING

Junxure training specialists help advisors and their teams maximize the capabilities of Junxure in the context of their specific firm. Their orientation is practical rather than technical. They design and lead programs informed by their years of experience using

Junxure in their own practices. New Junxure customers choose between two levels of initial training programs, after which they can select from more than 20 web-based classes each year on topics such as compliance, tracking new prospects and workflow management. They can further enhance practice performance via customized training programs tailored to the firm's specific needs. These are conducted online or in person.

3. COMPREHENSIVE SOFTWARE SUITE

Junxure software is a robust CRM suite developed exclusively for financial advisors. It makes possible ultra-efficient practice management and high levels of client service. The Junxure suite includes: Junxure, a comprehensive, highly customizable practice management application; Junxure Mobile, which allows advisors to access their data remotely and securely from any web-based device; and ClientView Live, which enables advisors to extend their availability to clients via the web with secure document vaults, on-demand reports and other capabilities. In Q4 2012, Junxure will introduce Junxure Essentials, a web-based product that combines the essential capabilities of Junxure with the inherent benefits of the cloud. Junxure Essentials will not replace the Junxure desktop application, but will give advisors a choice between the two.

About Junxure

Junxure was established in 2001 by Ken Golding and Greg Friedman, MS, CFP®, a financial advisor who developed the initial Junxure software to help him streamline operations at his growing firm. Today, Friedman is both Junxure president and president of Private Ocean, one of the West Coast's most innovative wealth management firms. The inspiration for Junxure consulting, training and software comes from Greg's day-to-day experience running his practice and helping his clients achieve their personal financial goals. In October 2010, Junxure was one of three firms selected by Charles Schwab® to be part of Schwab Intelligent Integration™, together with Salesforce and Microsoft®. Nationwide, more than 9000 people use Junxure services and software.