

## **PRESS RELEASE**

### **PRINCIPAL VALUATIONS NOW AVAILABLE THROUGH ADVISER OFFICE**

Principal Investment Management, the specialist private client investment manager, has linked up with 1st – The Exchange, providers of the market leading ‘Adviser Office’ software.

‘Adviser Office,’ which has over 13,000 users in 1,400 adviser firms will allow users access to their Principal clients’ valuations directly from their own back office system.

Anne Gilbert, Principal’s Managing Director, comments: “At Principal we are always looking to improve our service to IFAs. Many of our IFAs are already users of Adviser Office, and our link with 1st – The Exchange will enable those IFAs to save time and reduce paperwork.

“Here at Principal we pride ourselves on personal service as well as efficient and accurate administration – the way we are working with 1st – The Exchange highlights our commitment to both these key factors.”

“We expect the news of Principal linking up with 1st – The Exchange to be enthusiastically received by advisers who use ‘Adviser Office’.”

Benefits for advisers will include:



www.principalinvestment.co.uk

**PRINCIPAL INVESTMENT MANAGEMENT LIMITED**

16 SOUTH PARK SEVENOAKS KENT TN13 1AN  
TEL: 01732 740700 FAX: 01732 740287 (Registered and Head Office)

MANSION COURT 25 WATLING STREET LONDON EC4M 9BR  
TEL: 020 7367 9400 FAX: 020 7367 9500

5 MILES'S BUILDINGS GEORGE STREET BATH BA1 2QS  
TEL: 01225 460010 FAX: 01225 446434

- Time saved by accessing information about all their client's investments in one place
- Reduction in errors, as information does not have to be retyped manually
- Cutting down unnecessary paperwork
- Ability to view the Principal portfolio in the context of the client's overall investments
- Facility to customise reports at the touch of a button

**ends**

**For further information, please contact:**

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**Notes to editors**

**Principal**

Principal is a leading private client investment specialist in the South of England. Founded in 1987, they now employ around 90 people in their offices situated in Sevenoaks, London and Bath. Principal look after almost £1 billion on behalf of their clients.

Principal specialise in discretionary portfolio management for private individuals, family trusts and smaller corporate clients.

## **1st - The Exchange**

1st – The Exchange are market leading providers of technology solutions to the financial services market and are part of the financial services division of Vertex, a provider of solutions to the mortgage, life, pension, investment and distribution market sectors.

Together they provide an integrated suite of technology solutions, software and consultancy to the financial services industry which help support the key stages of an intermediary's business process, whatever its size. In doing so they enable their users to service their clients more efficiently and profitability, whilst meeting regulatory demands, reducing costs and maximising profits.

The Exchange is the largest provider of online comparative quotations and electronic new business applications in the UK financial services portal market. Its two main products are Exweb, for advisers and brokers, and Officeweb. Exweb is the UK's leading intermediary trading platform in the financial services market, used by over 25,500 registered users within authorised advisory firms. It provides online information and transaction services, with 110 million client illustrations processed over the service in 2006.

1st develops, markets and supports software delivering financial planning, client management and full back office administration to financial intermediaries. 1st's 'Adviser Office' software, is the market-leading client management solution used by more than 1,400 Adviser firms offering wealth management and financial advice, both Multi-tied and Independent. Based on Microsoft SQL Server and .net Technology, Adviser Office and Adviser Evolution link with over 60 partners, including product providers, portals and fund supermarkets to aggregate client data and avoid any data re-keying.

The Financial Services Division of Vertex employs approximately 1,600 people and has offices in Cheltenham, Chester, Bristol, Dudley, Warwick, Woking, Toronto and Vancouver.

