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Portfolio Systems, Inc. Releases Portfolio Director™ Version 8.0

Portfolio Systems, Inc. (PSI) has released Version 8.0 of its Portfolio Director™ software to new subscribers. Subscribers to Version 7.0 will be upgraded to the new version automatically over the next few months.

“We incorporated many features our customers suggested,” company spokesperson and software developer Bob Yacobucci stated, “and built it on an open technology platform that’s scalable, network capable, and ready to include plug-ins as our customers and third parties develop them. And, because it’s an application that is downloaded onto the customer’s own equipment, the software uses Java technology and a SQL database platform, so it runs on Mac, Linux, and Windows operating systems.”

Portfolio Director™ Version 8.0’s most significant enhancements include: An intuitive web-browser-style interface that uses point-and-click links; Easy scalability from single-user to multiple-users; Full networking capability; Report customization features including the capability to easily include a company logo, footers, and disclaimers; Report design flexibility including the capability to change column titles, fonts, etc; And blended benchmark and multiple-benchmark comparison reports.

The optional PDWeb™ service allows subscribing advisors’ clients to access their account reports online through the advisor’s web site. Advisors can customize the online reports as easily as they can customize reports in the application.

Version 8.0 utilizes PSI’s proven Performance Measure Engine™ business logic, and continues to provide the tools for client billing, portfolio modeling and rebalancing that customers have come to expect. Portfolio Director™ is compatible with major brokers and trade clearing firms including Fidelity, Schwab, Bear Stearns, Scottrade, TD Ameritrade, and BrokersXpress. A complete listing is available at:
<http://www.scscompany.com/brokers/>.

Subscription fee for a single-user license is \$150 per month, with no setup or interface charges. One hour of product support training is included with the subscription. Additional support time can be purchased as needed, for \$50 per hour.

Portfolio Systems, Inc., has been a provider of investment portfolio management software for Registered Investment Advisors, CPAs, and individual investors since 1999. The closely-held company is headquartered in Hollidaysburg, Pennsylvania.