

## **PORTFOLIO DIRECTOR FOR ADVISORS ADDS MORE INTERFACES**

Capabilities Allows Effortless Downloading of Trade Data from Two Major Broker Dealers

HOLIDAYSBURG, PENNSYLVANIA – February 28, 2005 - Portfolio Systems, Inc., (PSI) a provider of investment management technology products, today announced it has completed interfaces with TD Waterhouse Institutional and Ameritrade Institutional. These interfaces are now available at no extra charge and add to an existing roster of interfaces including Fidelity, Schwab, brokersXpress, and Penson among others.

Bob Yacobucci, PSI President, stated "These new interfaces offer Advisors using TD Waterhouse Institutional and Ameritrade Institutional an easy solution to consolidate their client data. And best of all, they are being provided at no extra charge. These are great additions to our software and reflect our commitment to providing professional level software at a reasonable price."

These two new interfaces enhance Portfolio Director's consolidated reporting functionality. Viewing a client's investments across multiple investment custodians now can include TD Waterhouse Institutional and Ameritrade Institutional if applicable. "Advisors and investors like to see how their accounts are performing in one view regardless of where the assets are held," Yacobucci, PSI President added

Disclaimer: The availability of these interfaces does not represent an endorsement of PSI products or services by TD Waterhouse or Ameritrade.

About Portfolio Systems Inc.  
Founded in 1999, Portfolio Systems, Inc. delivers investment management technology products to investment professionals and individual investors worldwide. Customers receive timely updates and enhancements and unlimited access to client support. Additional information can be found at [www.portfoliodirector.com](http://www.portfoliodirector.com)