

## **PORTFOLIO DIRECTOR FUNCTIONALITY ENHANCED FOR ADVISORS**

### Client & Investor Communication Enhancements and Model Portfolios Rolled Out

HOLLIDAYSBURG, PENNSYLVANIA – January 31, 2005 - Portfolio Systems, Inc., (PSI) a provider of investment management technology products, today announced it has released a number of new enhancements for its Portfolio Director System. The newest version is now available and being used throughout PSI's client base.

Frank J. Thomas, President of Florida based Fact Investments, Inc., "Today we are much better equipped to handle growth and communicate results with our clients on a real time basis. Our ability to do portfolio allocation studies and analysis has been greatly enhanced thanks to Portfolio Director and all of this has been done in an extremely cost effective way."

This latest release includes:

- Grouping of portfolios
- Client billing improvements
- Batch printing and emailing of investor statements
- PDF production of firm and client documents
- Enhanced customer tracking and notes
- Numerical values for benchmarks
- Model portfolios with rebalancing alerts

"This version incorporates many suggestions sent to us by our client base and represents our continued commitment to provide quality investment management software at a reasonable price. We're excited with this new release because it further demonstrates that Portfolio Director is a serious contender in the market place and offers a new alternative for investment advisors," Bob Yacobucci, PSI President noted.

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)