



## **BELLATORE PARTNERS WITH THREE TECHNOLOGY INDUSTRY LEADERS TO ENHANCE SERVICE**

San Jose, Calif., February 28, 2008—Bellatore, LLC, an emerging provider of turnkey asset management services to select financial advisory businesses, today announced its service partnership with three leading technology providers: Vestmark, Odyssey Financial Technologies (formerly Xeye) and Redi2 Technologies.

“By partnering with all three of these technology service providers, Bellatore is able to dramatically increase the quality and number of tools our clients have at their disposal,” said Al Steele, President and CEO of Bellatore, LLC. “These partnerships provide a well-rounded approach to front office flexibility, unified managed accounts, automated billing and revenue management. Leveraging this technology suite will provide a high-quality, cost-effective outsourcing solution to independent advisors.”

The partnerships will offer industry-leading technology and services to Bellatore Investment Counsel, Inc., a wholly-owned subsidiary of Bellatore, LLC. These technology alliances are a major step in the firm’s mission to redefine technology in the industry by creating faster processing, greater data availability and the convenience of best-in-class systems that integrate seamlessly.

Vestmark is a leading provider of technology platform solutions for unified managed accounts (UMAs), which combine portfolio management, portfolio accounting and the integration of various investment products. Vestmark will supply the core technology for Bellatore’s platform, giving Bellatore advisors the ability to combine mutual funds, ETFs and individual securities into one managed portfolio.

Odyssey Financial Technologies is an industry leader in the global provision of private wealth and asset management solutions and services. Odyssey’s Wealth Manager™ Platform will deliver a front office solution that includes advanced portfolio construction, investment policy statements and proposals, client and advisor reporting, and client and advisor website access.

Redi2 Technologies’ Revenue Manager™ will automate the billing and revenue management operations of Bellatore Investment Counsel and help the firm manage the fee billing process by automating account setup and termination, revenue reconciliation, invoice generation, special adjustments and reversals. Redi2 STP Automation streamlines processing by filtering exceptions and automatically prioritizing only those items that need personalized attention.

### **About Bellatore Investment Counsel, Inc.**

Bellatore Investment Counsel, Inc. delivers asset management services, investment products and business knowledge that support independent advisors and the investors they serve. The Bellatore Total Business Solution helps advisors accelerate their practices and focus on the areas where they add the most value. This customized outsourcing model centers on business management, back office support, investment solutions and wealth planning. Bellatore Investment Counsel, Inc. is a wholly-owned subsidiary of Bellatore, LLC. For more information, visit <http://advisors.bellatore.com>.

### **About Bellatore, LLC**

Bellatore, LLC is a financial services company that delivers knowledge leadership services, turnkey asset management solutions and practice equity monetization services. Bellatore provides a distinct

array of practice management services to independent financial advisors interested in accelerating their practices. Bellatore also helps financial institutions bring meaningful value to their businesses through practice management and business consulting, public speaking, wholesaler training, and business intelligence services. For more information, visit [www.bellatore.com](http://www.bellatore.com) or contact:

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*Please note: As of May 30, 2008, Bellatore Investment Counsel is a division of Bellatore Financial, Inc.*