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Lync.NET eNews Winter 2003

Lync.NET...The one stop for investment management technology

Winter 2003

Greetings!

Welcome to the Winter 2003 edition of Lync eNews. We at Lync.NET are very excited about this edition which is dedicated to the improvement of the client statement production process. We hope you enjoy, please call (212) 971 9299 if you would like to speak with me directly.

Kindest Regards,

Cara Brosnan - VP of Sales and Marketing

PackMan 2003 Released!

Lync.NET is pleased to announce that **PackMan 2003** has just been released!

PackMan is the industry leader in client statement **automation** and secure web reporting, enabling investment management firms to **reduce costs** and transform period end client statement production into a **cost effective** competitive advantage. PackMan electronically collates documents from third- party portfolio accounting systems with documents from Microsoft Office, pre-existing PDF files, HTML files and more, into a single Adobe Acrobat PDF file. Client Statements are easily viewed, approved online, printed or transmitted to the web for client access.

PackMan allows firms to free up resources for more strategic activities, increase customer satisfaction while **reducing statement production costs by up to 70%!**

A few of the new features in PackMan 2003 are:

- **Page Numbering** - add clean, consistent page numbers to client statements so clients can easily navigate your statements.
- **Task Scheduling** - easy to set up tasks fully automate statement production so high resolution graphical client statements can run unattended or overnight so you can do other productive tasks.
- **Extended File Names** - longer statement file names allow you to save statement files in plain English without cryptic abbreviations and annoying codes that confuse clients and employees.
- **Enhanced Log Files** - easy to read and understand log files help you pinpoint errors in your statement production process before they are printed, which saves time, money and a lot of trees.

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Client Focus: Ron Bartosh, VP - Guyasuta Investment Advisors

We have been using PackMan since September 2000 and have improved our client statement accuracy, speed and efficiency many times over. The process to run all of these statements now takes about 8 hours, compared to two to three weeks in the past.

Many of our clients also have their accountants and tax advisors view their statements on line via Lync's WebReps service, alleviating the need to print out and mail extra copies to all the parties involved in an account. I highly recommend this software to anyone who complains about the time it takes to report to clients. With a little knowledge of your portfolio management software and PackMan, the client statement production process becomes a non-issue.

To the Team at Lync.NET, thank you for your dedication to a great software product that has made our life much easier every day.

ClearView Client Statements - The Competitive Edge

One of the principal means for an Investment Professional to provide information to their clients is through client statements. It is critical that client statements present investment portfolio data in a clear and easy to understand manner.

Despite the dawn of the information age, client statements have often been confined to unformatted legacy system print-outs that are difficult to read. Such reports have tended to be accompanied by a cover letter that contains whatever analysis and statistics an individual manager is able to prepare. This form of reporting usually results in pages with different formatting, no cover-to-cover page numbering, poor quality graphics and no meaningful personalized information. These limitations are due to the lacking capabilities of the information systems available in an organization.

ClearView Client Statements is a design and development service that makes it economically and technically possible for investment professionals to communicate pertinent investment information to clients in a graphically rich, consolidated, professional statement with a stunning appearance that is in-line with the image that your firm has worked so hard to create, yet very easy to read.

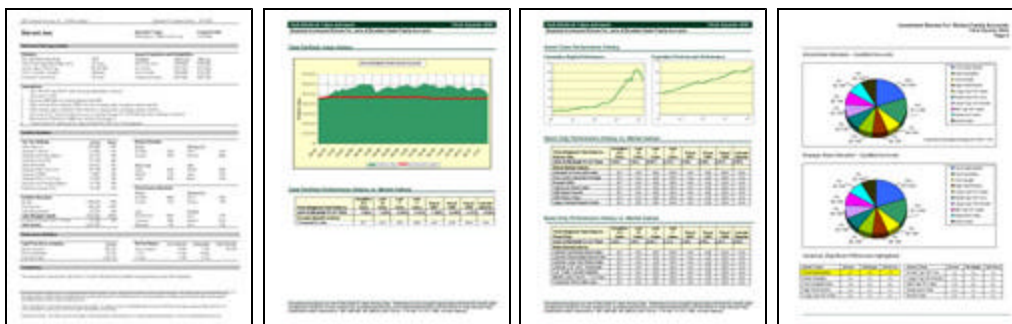
Through dozens of ClearView experiences, Lync has perfected its approach to delivering ClearView Client Statements on-time, on-budget and with no surprises. Our approach is based on a fixed price model so that you can accurately budget and ensure project success. Depending on your firm's budget, a ClearView Client Statement can be a simple and elegant 1-page summary that compliments your stock portfolio system reports, or an elaborate 15-page work of art that articulates every facet of your firm's investment management philosophy. Whatever your choice is, Lync will escort your firm through the creative process to prototype your ClearView Client Statement, then develop it, test it and implement it at your firm's site. All ClearView Client Statements are powered by the industry leading statement automation system PackMan, which automates the entire production process from end to end.

Investment Professionals that have chosen ClearView Client Statements solutions tell us:

- ClearView Client Statements demonstrates our strong commitment to each client and understanding of each client's investment profile, risk tolerance and goals. We

now have a simple, elegant statement that our clients do not need a portfolio manager to explain to them every quarter, which opens the door for communications about more important issues. Our client retention and satisfaction has never been higher.

- Our old quarterly reports were a mish-mash of portfolio system reports, spreadsheets, cover letters and investment analyses. We thought we had a good solution for our clients, until Lync showed us their ClearView Client Statements. We knew that if our competition has this tool, we will be at a major marketing disadvantage, so we struck first and implemented ClearView. The marketing advantage is significant.
- With the downturn in the market, we knew that we had to improve our client statements to remain competitive and grow our business through the bear market. We thought the only way to do it is a \$100,000 data warehouse with \$50,000 of integration costs and another \$75,000 for custom report programming. Lync showed us the ClearView solution and how we could leverage existing systems, yet have the flexibility to handle any of our clients' situations. With ClearView, we saved over \$150,000, got more than what we wanted and produced our first reports the following quarter.



PackMan 2003 New Release Promotion!

Would you like to automate your 2003 year-end client statement production process and reduce costs by up to 70% with only a small investment? You can!

To complement the release of PackMan 2003, Lync.NET is offering a 3 year, single user license for only **\$5,000**. This represents a 26% cost **savings of \$1,300**. Included with the license is Lync.NET's award-winning customer service, product upgrades and user documentation. Similar discounts apply to multi-user licenses as well. Please call us to obtain a price quote based on the exact number of users your firm requires. To take advantage of this offer, signed contracts and payments must be received by December 31st 2003.

For more information, please call me, Cara Brosnan, VP of Sales and Marketing at (212) 971 9299.

From all of us here at Lync.NET, we wish you and your families a happy, healthy and prosperous New Year.

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