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Houston Investment Management firm automates their quarterly reporting process by implementing PackMan 2007 from Lync.NET:

Salt Lake City, UT, September 12, 2006 – Lync.NET, announces that The Financial Advisory Group, Inc. A Houston Texas based Registered Investment Advisory firm, has successfully implemented Lync’s PackMan report automation software.

“Packman 2007 has greatly aided our quarterly reporting process. We now save each client’s entire report package to Adobe Acrobat files, which can be printed, stored on our network, e-mailed to our clients, or posted on our website for easy client access. Reviewing the Adobe Acrobat files is much quicker than reviewing huge stacks of paper reports. In addition, we now run the printing and review process in parallel where previously we had to print out all the reports and then review them. As a result, we have shaved several days off our quarterly reporting process. With Packman’s ability to collate different software packages, we have eliminated all errors and frustration resulting from hand collating reports. We are extremely pleased with the Packman software and the support behind it.” David Jenkins, Financial Planning Associate - The Financial Advisory Group

PackMan 2007 offers capabilities such as:

- Eliminate manual collation and photocopying, as well as paper filing, storage, and retrieval.
- Streamline the approval process with on-line reviews before you print.
- Customize each statement for each client. Tell PackMan what each client wants, and PackMan creates a customized statement.
- Minimize the cost of fulfillment and mailing with email and/or automated file transfers to the WebReps secure website.
- Decrease time employees spend on tedious, manual work.
- Increase employee productivity and decrease labor costs associated with statement generation.
- Reduce processing errors and deliver report packages faster.
- Increase customer service by providing timely, accurate, and customized statements.
- Provide your clients password-protected web access to their reports with Lync’s WebReps.

PackMan 2007 is a simple yet robust software program that is easy to set up and use. PackMan automatically creates customized report packages using any combination of MS Office documents and your PMS system. Each client statement PackMan creates is a single PDF document, which is easily viewed, approved online, printed or emailed, and can be transmitted to Lync’s secure WebReps server for client access.

About Lync.NET

Founded in 1995, Lync.NET provides PC and Web technology to prepare, print and web access client reports without manual labor or intervention. Our goal is to save our clients time and money through automating the manual tasks associated with generating client reports. Lync has helped over 300 clients reach this goal.

About The Financial Advisory Group

The Financial Advisory Group, Inc. A Houston TX based Registered Investment Advisor, provides high quality “one-stop-shop” comprehensive financial planning, investment management, and business consulting services. We have created a boutique firm that embraces client service with a staff composed largely of professionals with experience as former practicing Certified Public Accountants, Attorneys and Investment Officers.

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