



Lync.Net
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Michigan Based Financial Advisor Goes Live with TRADE from Lync.NET for Tax Efficient and Compliance Oriented Trading

New York, NY, February 8th, 2005 – Lync.NET, the one stop for investment management technology, announced today that Michigan based firm Plante and Moran Financial Advisors (PMFA) is live on InvestProTrade 2004 from Lync.NET, which allows Investment Professionals to identify tax efficient trading opportunities, automate complex relationship investment policy management and thus the whole trading process while reducing trading errors and increasing operational efficiency.

InvestPro Trade 2004 from Lync.NET provides “what if” analysis and modeling to show proposed trade effects on asset allocation and restrictions, enabling investment professionals to pin point trading opportunities and simplify tax lot gain harvesting. In addition, InvestPro Trade 2004 is the most intuitive & compliance oriented trade order management system on the market. *“Client service, trading compliance, and operational efficiency are high priorities at Plante and Moran Financial Advisors,”* states Art Albin, Partner at Plante and Moran Financial Advisors. *“Trade enforces compliance with its security restrictions capabilities which can be applied at the firm wide, relationship and / or portfolio level. Far less time is required by senior staff to approve trades because compliance tools are built into Lync’s Trade.”*

Designed with a web based front end and SQL back end, InvestPro Trade 2004 enables Investment Professionals to achieve straight through processing while reducing operating costs. *“Trading and transaction processing errors are greatly reduced,”* added Albin, *“Efficiency has allowed us to grow our assets under management and number of client relationships per manager, improving profitability.”*

InvestPro Trade 2004 offers advanced capabilities such as:

- Open Microsoft SQL database enabling easy systems integration and reporting.
- Secure internal routing and approval process for proposed trades from junior to senior investment managers.
- Attaching of documents and notes to proposed trades as an audit trail for compliance purposes.
- Intuitive, easy to use browser based interface requires minimal training and anytime, anywhere access for managers.
- Innovative relationship management screens enable drill down capabilities in accounts all the way down to individual tax lots.
- Detailed trade audit trail puts a time and date stamp on every user’s action on a trade from concept through reconciliation for compliance.
- Automated trade reconciliation has built in tolerance settings for reconciling large volumes of trades in a short period of time.

InvestPro Trade 2004 is part of the InvestPro™ suite of products. All of the InvestPro™ components can operate as a seamlessly integrated whole solution or à la cart with your existing systems. The products are scalable to accommodate a range of investment firm sizes and budgets. For more information on InvestPro Trade 2004 or other InvestPro™ offerings; please contact sales@lync.net



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About Lync.NET

Lync.NET's, InvestPro™ Suite is the first and only complete, integrated, web-based, Microsoft SQL throughout solution that automates mission critical requirements of professional investment firms. Lync.NET was founded in 1995 and has provided technology solutions to hundreds of investment management firms ranging from investment advisors to century old global custodians.

About Plante and Moran

Plante & Moran Financial Advisors ranks as the 39th largest independent financial adviser in the country serving as a trusted advisor to high net worth individuals and family business owners, helping them build, manage and preserve their wealth. Their integrated service offering includes investment consulting, financial planning, trust, insurance consulting, estate planning, business succession, and tax planning. Founded in 1977, Plante Moran Financial Advisors is an entity of Plante & Moran, PLLC, the nation's 10th largest accounting and management-consulting firm. Our Internet address is www.plantemoran.com.

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