

## **Finaplex enhances wealth management platform with Telekurs Financial's Valordata Feed**

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**Zurich, Switzerland. Telekurs is pleased to announce that Finaplex, a leading supplier of wealth relationship management software to some of the world's most prominent wealth managers, has licensed the Valordata Feed to enhance its wealth management applications solutions.**

In keeping with its mission to offer superior software and data integration services to an expanding wealth management customer base, Finaplex will integrate reference data and pricing from Telekurs Financial's Valordata Feed ("VDF") into its Finaplex OnDemand product.

The Finaplex OnDemand product is a hosted, web-based, client relationship and portfolio management application for financial advisors. The Finaplex OnDemand application integrates tax lot accounting, GIPS-consistent performance measurement, CRM, proposal generation and portfolio management into a single wealth management platform. Finaplex also offers optional reconciliation services, providing a near turnkey application environment for users.

"Finaplex was founded to meet the retail financial services industry's need to see their customers' complete financial picture, make proposals that gather assets, and manage portfolios more effectively", said Peter Tierney, President & CEO of San Francisco-based Finaplex. "By combining a sophisticated database with modular business applications that map directly to the wealth management cycle, the Finaplex OnDemand application consolidates real-time information from all in-house and third-party systems into a single desktop, and provides wealth managers with a true household view of a client's holdings, preferences and restrictions."

Mr. Tierney went on to say, "The addition of global reference data and pricing from Telekurs Financial gives our clients access to an extraordinary breadth and depth of worldwide security-level information, along with a fully automated update process made possible by Telekurs' fully encoded data structure. By including this data set in our Finaplex OnDemand service, our wealth management customers will be able to greatly improve their ability to analyze customer portfolios on an intraday or daily basis."

The VDF from Telekurs will be used to drive Finaplex OnDemand applications ranging from Proposal Generation and Portfolio Analysis, to Performance Reporting.

“One of the fundamental goals of the Finaplex suite of wealth management applications is to equip wealth managers with automation and integration, allowing them to deliver better advice and targeted products, while streamlining front-office operations”, said Barry Raskin, Managing Director of Telekurs Financial in the Americas. “Our Valordata Feed is ideally suited as a data source for these applications, because the 3.3 million global securities provides breadth of coverage and the structured, fully encoded data provides depth of automation. We are very pleased that Finaplex has chosen to enhance its overall service offering by including Telekurs as a significant content partner.”

### **About Telekurs Financial**

Telekurs Financial is one of the leading providers in the area of acquisition, refinement and distribution of international financial information. A global network of local financial market specialists procures real-time stock-exchange information directly from source in all major financial centres. With 20 offices in 16 countries, Telekurs Financial maintains a database of structured, encoded securities information that is unparalleled throughout the world in terms of both depth of information and data coverage. For more information, please visit [www.telekurs-financial.com](http://www.telekurs-financial.com).

**Telekurs (USA) Inc.** is one of 20 Telekurs Financial offices located in 16 major financial centers around the world, and is one of the company's regional data collection centers that is responsible for direct sourcing of descriptive and market data from over 750 global exchanges and third-party contributors. With such far-reaching coverage of global markets consolidated into a single, normalized data service, Telekurs Financial offers one of the most comprehensive data feeds available today. For more information, visit [www.tkusa.com](http://www.tkusa.com).

### **About Finaplex, Inc.**

Finaplex is focused on providing technology solutions to financial services firms that improve client loyalty and generate added revenue by more efficiently and professionally advising and serving their clients. Finaplex's goal is to help leading financial institutions deliver more to their wealth management clients and, as a result, realize increased market share and competitive advantage.

Finaplex was founded in March of 2000 by three financial industry executives seeking to address a pressing business problem in the retail financial services industry. Based in San Francisco, Finaplex is today an emerging leader in providing wealth management and retail investment technology solutions. In addition to creating and offering market-leading products for wealth relationship management, the company is also actively involved in defining the role of how technology is applied to wealth management. For more information, please visit [www.finaplex.com](http://www.finaplex.com).

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