



BridgePortfolio®

Cure your back office blues.®

Draft 1.0 9/8/11

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Trinity Portfolio Advisors chooses BridgePortfolio® for Back Office Outsourcing

For immediate release:

Chicago, IL – December 26, 2011 – BridgePortfolio® today announced that Trinity Portfolio Advisors, an advisory firm based in Fort Worth, Texas with more than \$300 million under management, has chosen to change its back office outsource provider to BridgePortfolio. Trinity has contracted for BridgePortfolio to take over all its [back office outsourcing](#) tasks, including account data downloads, reconciliation, performance reporting, and fee billing. Trinity will also take advantage of BridgePortfolio's customized online account opening process and proposal generation system to streamline and make more uniform the process of opening new accounts. And finally, Trinity is going to utilize the Fiserv APL trading tools provided and maintained by BridgePortfolio to easily manage its model portfolios across several hundred clients.

"We believe that BridgePortfolio offers a perfect combination of industry-leading technology and a commitment to customer service to serve this segment of the RIA market," said Jeri Liedl, Chief Operating Officer at Trinity Portfolio Advisors. "We have been talking looking at and talking to BridgePortfolio for several months and we are now very excited to get this partnership up and running."

We are very pleased that Trinity has chosen to work with BridgePortfolio. We are looking forward to working with the Trinity team and we are committed to helping them succeed by delivering the highest quality service augmented by our client-focused technology," said Peter Dietz, CEO of BridgePortfolio.

Profiles of Each Company

About BridgePortfolio®

BridgePortfolio Inc., whose predecessor company was founded in 2000, is headquartered in Chicago and is a wholly owned subsidiary of Insignis Inc. The Company has approximately 50 customers (called partners) across the United States with almost \$2 billion in assets under administration. BridgePortfolio has developed a diverse menu of services that can be outsourced, including [private label website development](#) and hosting; efficient online account setup; account administration; [performance reporting](#); [model portfolio trading](#); [billing](#); third-party separate account management and private label separate account platform creation and maintenance.

Bridge*Portfolio* also partners with Capital Market Consultants to design/develop customized, private-labeled fee-based platforms for investment advisors, investment managers, broker-dealers, field marketing organizations, financial planners, banks and trust companies. Their mission is to help these companies to profitably deliver

[investment advisory services](#) such as ETF and mutual fund model portfolios and SMA and UMA programs. For more information, please visit <http://www.bridgeportfolio.com>.

About Trinity Portfolio Advisors

Trinity Portfolio Advisors, LLC (“Trinity Portfolio Advisors”) is an SEC [registered investment adviser](#) with its principal place of business in the State of Texas.