



# BridgePortfolio®

Cure your back office blues.®

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## Wolf Financial Management chooses BridgePortfolio® for Back Office Outsourcing

*For immediate release:*

**Chicago, IL – September 8, 2011** – BridgePortfolio® today announced that Wolf Financial Management, an advisory firm based in Oakbrook Terrace, Illinois with more than \$200 million under management, has chosen to outsource its back office to BridgePortfolio. Wolf Financial will utilize BridgePortfolio for all its [back office outsourcing](#) needs, including account data downloads, reconciliation, and performance reporting, and will also take advantage of BridgePortfolio's customized online account opening process to facilitate the opening of new accounts. Additionally, Wolf has established investment models on BridgePortfolio's system and now has the ability to trade these models with BridgePortfolio.

"We are a true believer in outsourcing," said Darrell Pepple, President of Wolf Financial. "And BridgePortfolio is able to provide a very cost effective and robust outsourcing offering, with an extremely high level of commitment to accuracy and customer service".

"We are excited to be working with Wolf Financial to deliver outstanding service to their investors. The objective of our family of services is to afford advisory firms a greater opportunity to focus on providing high-level services to their clients, while BridgePortfolio provides the infrastructure to allow them to grow their business in a scalable manner", 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.

BridgePortfolio 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 Wolf Financial Management**

Wolf Financial Management is a Registered Investment Advisor and Broker-Dealer offering comprehensive financial services to help clients achieve their long-term financial goals.