



NEWS

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Advent Software Selects ByAllAccounts to Provide Retail Account Information to Advent OnDemand® Users

Facilitates Advisors' Ability to Advise on Retail Accounts

BOSTON -- May 15, 2012 - [Advent Software, Inc.](#), (NASDAQ: ADVS), a leading provider of software and services for the global investment management industry, announced it has selected [ByAllAccounts, Inc.](#) to provide retail account information to users of the Advent OnDemand® service. This new capability will enable investment advisors who use Advent OnDemand® to electronically access retail account information from brokers and custodians.

ByAllAccounts uses its patented technology to access retail account information from custodian and broker websites, automating a process that many financial advisors are still doing manually - namely entering data from paper statements or downloading data from an online account. Advent will now make data from ByAllAccounts available to Advent OnDemand® users via Advent Custodial Data (ACD). As a result, Advent OnDemand® users will be able to augment their managed data with some additional retail account information.

“We are always looking for ways to expand access to custodial data for our clients,” said George McLaughlin, senior director, Advent Software. “By working with ByAllAccounts we are now able to offer retail account information to Advent OnDemand clients, making it easier for them to report on their clients’ assets.”

In a ByAllAccounts' survey, almost 75 percent of financial professionals said they provide advice on all of their clients' assets, including those assets held outside their firm's primary custodian. "We know how important it is for advisors to be able to provide exceptional service to clients," said ByAllAccounts President and CEO James Carney. "Being able to get held-away assets data smoothly integrated into a solution like Advent OnDemand® is an enormous advantage for advisors."

About Advent Software, Inc.

Advent Software, Inc., a global firm, has provided trusted solutions to the world's financial professionals since 1983. Advent's quality software, data, services and tools enable financial professionals to improve service and communication to their clients, allowing them to grow their business while controlling operational risks and costs. Advent Custodial Data (ACD) delivers comprehensive data sourced directly from custody systems of record and is delivered through secure data feeds developed in partnership with each custodian. Advent OnDemand® is Advent's solutions delivered via the software as a service (SaaS) model, with or without data management services. From secure software hosting, to comprehensive and customizable data management, operations and client reporting solutions, Advent OnDemand® helps clients control costs, reduce operational risk and enables superior client service.

About ByAllAccounts, Inc.

ByAllAccounts, the financial advisors' choice for account aggregation since 1999, is a service that retrieves, enriches and consolidates reconciliation-ready account data from any custodian. ByAllAccounts' patented aggregation engine, through which hundreds of billions in assets flow daily, aggregates all client account data -- from any source -- within an advisor's wealth management platform or trust accounting system for a truly comprehensive view. Thousands of advisors rely on ByAllAccounts to save administrative time and costs, mitigate risk associated with having incomplete information and grow revenues through client referrals and new business development. ByAllAccounts integrates seamlessly with all of the most popular wealth management platforms. For more information, visit www.byallaccounts.com.

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