



Junxure Announces New Release to Office Management Technology Platform

~Version 8.7 enhancements provide deeper portfolio management integrations and advanced functionality to better manage client data, provide efficiencies and enhance advisor productivity

Palm Beach, FL – July 28, 2010. CRM Software, makers of Junxure, the industry's leading CRM and office management software for financial advisors, announced today the release of Junxure Version 8.7, a major enhancement to the current Junxure Version 8.

Version 8.7 includes a new PortfolioCenter® Import Wizard that significantly improves data importing from the PortfolioCenter portfolio management software from Schwab Performance Technologies®, along with new features and functionality that allow users to better manage their client data through enhanced formatting, reporting and navigation.

“Software integrations are critical in driving efficiencies in financial advisory practices,” said Junxure President and founder Greg Friedman, CFP®. “The enhanced integration for PortfolioCenter in Junxure 8.7 will be a key tool in streamlining and simplifying many back-office processes, saving advisors valuable time.”

Michael Williams, Director of Sales and Service for Schwab Performance Technologies, agrees. “Many of our PortfolioCenter clients use Junxure and the new release increases their ability to access client financial information from PortfolioCenter. This gives advisors greater visibility into their client relationships and they can see it all in one place,” said Williams.

Junxure Version 8.7 is an extensive update to the office management and CRM platform used by over 8,000 financial professionals. Some of the new features and functionality include:

- **Enhanced PortfolioCenter Integration** – The PortfolioCenter interface offers broader and more customizable data integration to include Account-level as well as expanded Asset-level data.
- **Junxure Outlook® Inbox Routing Enhancements** – An easier, more efficient way to automatically handle incoming emails, this feature allows users to route and block emails by email address, domain, and subject content.
- **Formatted Text in Actions** – Important action items can be made to stand out through the use of text colors, bullets, highlighted text, font size and style.
- **Enhanced Action Navigation** – The new Linked Actions feature makes it easier to search for and link related actions to quickly find specific client actions with filters and keywords.
- **Improved Workflow**– Recurring Action Sequences trigger a single action or a set of related actions to ensure that tasks are automatically initiated and followed up on, simplifying workflow processes.

“As part of our mission to make Junxure increasingly more valuable to financial advisors, we are constantly reviewing our platform and listening to user feedback to find ways to make Junxure even more useful. The release of Junxure 8.7 is the latest example of that commitment,” concluded Friedman.

About Junxure

Junxure (www.junxure.com) is the award-winning and flagship product of CRM Software, an innovative software development firm based in Palm Beach Gardens, FL with operations in the heart of the “Research Triangle” in Raleigh, NC, New York City, Ohio, Oregon and California. Recently named to the Inc 5000 fastest growing privately held companies, CRM Software and its Junxure suite of products provide total firm technology for financial advisors to grow, manage and enhance their advisory businesses.