



**FOR IMMEDIATE RELEASE**

**Envision Financial Systems Partners with FSSI  
to Deliver Streamlined Document Solutions**

*Partnership Enables Fund Companies to Improve Revenues and Customer Loyalty  
Through Integrated Marketing Communications*

**TUSTIN, CA. March 23, 2005** — Envision Financial Systems, the award-winning solutions company for the financial industry, announced today that Financial Statement Services, Inc. and Envision have teamed to create an improved statement design that incorporates full color and data driven graphics to simplify account information and help reduce call center volume.

The alliance between Envision and FSSI has brought together the best practices of transfer agency software and output technology to help financial services organizations lower costs and enhance customer relationships through custom printed and electronic documents. Using Envision's standard PowerAgent transfer agency data feed, FSSI helps clients to increase revenue and improve customer loyalty by integrating the latest technology in full color, dynamic graphics to deliver relevant marketing content across both Web and paper based communications.

Other benefits include:

- **Increase revenue and client loyalty** are the result of Web-based technology that enables targeted, selective messaging based on demographic information provided to FSSI through a Web interface with Envision's PowerAgent
- **Lower cost of statement production** through FSSI's Integrated Customer Communication (ICC) technology that consolidates account activity and securely delivers both paper and electronic documents
- **Improved statement design** incorporates full color, variable data charts and graphs to simplify account information and **reduce call center volume**

“We’re excited about the prospects of working with FSSI,” said Satnam Gambhir, President of Envision. “Their document solution provides outstanding flexibility and will help our clients in so many ways. In today’s competitive environment, a solution that can both help drive incremental revenue while lowering costs is welcome in any boardroom.”

“We selected Envision to partner with based on their strong reputation in the industry,” said Jon Clark, SVP Sales of FSSI. “It was clear to us that their



decades of experience in the fund industry combined with their in-depth technical knowledge best positions them for growth in the years ahead. Envision's PowerAgent transfer agency system has proven to be extremely flexible and easy to work with."

### **About Envision Financial Systems**

Founded in 1994, Envision Financial Systems, Inc. is a leading provider of software solutions to the institutional and mutual fund asset management markets. Using an in-depth knowledge of the financial services industry and extensive experience in software development, they create leading-edge global systems that are intuitive, scalable, and flexible. Their systems are based upon open standards, helping their clients compete in the ever-changing global environment. Envision's headquarters are in Tustin, California, with offices in Owings Mills, Maryland and Bangalore, India. For more information visit [www.enfs.com](http://www.enfs.com).

### **About FSSI**

FSSI helps clients to reduce costs and improve customer loyalty with best-in-class print and electronic document production and distribution services. Outsourcing to FSSI enables clients to focus on their core business while communicating more effectively with their customers. Founded in 1980, FSSI has grown to become the country's largest privately held service bureau. For more information about FSSI please visit [www.fssi-ca.com](http://www.fssi-ca.com).

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