Total Rebalance Expert Receives US Patent for "Analysis Expert" Functionality

~ *Innovative approach for viewing entire client base on one screen and ability to sort for "transaction triggers" streamlines portfolio rebalancing process*

San Diego, CA – January 8, 2012. Total Rebalance Expert (TRX) announced today the attainment of US Patent 8,321,320, granted November 27, 2012 for "Portfolio Management Analysis System and Method." This patent for the "Analysis Expert" functionality in TRX protects the design, methodology and technology for identifying rebalancing opportunities on one screen across an entire client base at the account, household and asset class levels.

"Advisors have been telling us all along that our approach to providing the needed technology to automate the portfolio rebalancing process was unique and innovative," said Cheryll Lurtz, TRX co-founder and CIO. "Now with this patent, advisors using TRX can uniquely benefit from that intellectual capital that was generated from the experiences in tax-efficient rebalancing developed in advisory practices."

The Analysis Expert feature in TRX enables advisors to view their entire client base on one screen and then sort for which accounts or households are out of guidelines and need rebalancing. The sorting capability can be used to identify "transaction triggers" for client needs and opportunities, such as:

- Excess cash that needs to be invested
- Cash that needs to be generated for distribution reasons
- Tax loss harvesting opportunities
- Asset class rebalancing needs
- Asset subclass rebalancing needs

From this screen, advisors can then simply click on a particular client or group of clients to produce the needed trades. The Analysis Expert capability enables advisors to rebalance much more frequently, even on a daily basis, to take advantage of market moves, tax law changes or other client needs.

Without this advanced level of functionality, advisors are forced to manually drill down on each account or household periodically to see if there is a need to rebalance. For

firms with hundreds of accounts or households, this process, even with other rebalancing systems that just calculate rebalancing amounts, often limits them to rebalancing on a quarterly or even annual basis.

"As a practicing financial advisor, I was frustrated with the current offerings on the marketplace that did not have the features needed to really take advantage of technology to automate the rebalancing process," noted TRX CEO Sheryl Rowling.

"Accordingly, we set out to build a portfolio rebalancing system that had the necessary flexibility and sorting capabilities to simplify the identification of rebalancing opportunities and this patent is a tremendous validation of the innovation inherent in TRX," concluded Rowling.

About Total Rebalance Expert
Founded in 2008, TRX is the industry's leading independent, portfolio rebalancing software platform. TRX provides financial professionals with a tax efficient and robust online software solution that provides advanced functionality to streamline the rebalancing process. Designed by an industry leading CPA advisor, TRX automates the complexities involved in rebalancing portfolios, enabling advisors to save time, eliminate errors and free them up to grow their firms and better serve their clients. TRX is headquartered in San Diego, CA with an office in Kansas City, MO. www.trxpert.com

For More Information, please contact:

Sheryl Rowling, Total Rebalance Expert
sheryl@trxpert.com
619.294.4TRX