



Praemium launches WealthCraft CRM

17 June 2013, Melbourne:

Praemium is pleased today to announce the formal launch of its WealthCraft system in Australia. WealthCraft, a new cloud-based customer relationship management (CRM) solution, was acquired by Praemium in 2012 and has now been fully developed to meet the needs of Australia's financial advice industry.

The launch follows a successful beta trial with several existing Praemium customers, including Mutual Trust, one of Australia's leading Family Offices.

CEO Michael Ohanessian stated, "Today's launch of WealthCraft in Australia marks a major milestone in the development of our company. The integration of WealthCraft with our core V-Wrap product strengthens our offering by providing our customers with a more complete, integrated and efficient solution."

"Our next step will be to integrate WealthCraft with our SMA platform in Australia, the UK and internationally." added Mr Ohanessian.

Further details on WealthCraft are provided in the attached media release.

About Praemium: Praemium Ltd (ASX: PPS) is one of Australia's leading suppliers of online financial portfolio administration technology, administering in excess of AUD45 billion-FUA*. Praemium also provides and operates Separately Managed Account (SMA) technology platforms, with more than \$0.8 billion in funds in Australia and more than £0.4 billion in the UK. Praemium currently provides services to approximately 600 financial institutions and intermediaries, including some of the world's largest financial institutions.

*As at 31 March 2013

For further information contact:

Mr Michael Ohanessian, Managing Director +613 8622 1222

Praemium now offers a fully integrated CRM

Praemium today announces the launch of WealthCraft, its new cloud-based customer relationship management (CRM) solution developed for Australia's financial advice market.

WealthCraft enables advisers and wealth managers to track and manage interactions with their clients, and assists advisers to satisfy Future of Financial Advice (FOFA) requirements, including Opt-in and preparation of Fee Disclosure Statements.

WealthCraft integrates with Praemium's V-Wrap portfolio administration technology; this means that advisers have access to consistent and up-to-date client data and communications and can easily search and reconcile data from one location.

Additionally, WealthCraft can give each of its various users access to the key client data they specifically need to do their jobs more efficiently.

Importantly, WealthCraft is built on the Microsoft Dynamics CRM platform. This has three important benefits for users:

- WealthCraft is fully integrated with Microsoft Outlook. All email and document interactions with clients are already contained within the CRM system for easier data storage and management.
- Users will be familiar with and know how to use Microsoft Outlook so it will be easier for firms to adopt and start using the software.
- Praemium will focus on specific enhancements tailored for financial advisers, and can roll out the most relevant enhancements at a faster pace while leveraging Microsoft's ongoing investment in the development of the CRM system.

During the 6-month beta trials Praemium received positive feedback on WealthCraft's flexibility and integration, and many of the beta sites are expected to fully incorporate WealthCraft into their business practices.

Mutual Trust, one of Australia's leading Family Offices, has adopted WealthCraft across its Wealth Management business after participating in the beta trial.

"WealthCraft is a very promising addition to Praemium's existing suite of software. The modules we have implemented add a new front-end dimension to the existing, very powerful portfolio administration platform, and are improving the systemisation and efficiency of our workflow management", Mutual Trust CEO Tim Hammon said.

Praemium CEO Michael Ohanessian commented, "Advisers are faced with unprecedented pressures as the industry goes through dramatic change so it is important that their technology providers assist them to deliver practice efficiencies, grow their businesses and comply with new regulations. We are very pleased that the addition of WealthCraft offers just such assistance."