

Leith Wheeler has never looked better to their clients

PROJECT GOALS

Like many wealth management firms, Leith Wheeler found the creation of client statements to be a time-consuming and highly labor-intensive process. In addition, management felt that the resulting statements suffered from a lack of branding and poor visual appeal. On-going growth at the firm meant further time spent on producing statements for an increasing client base - Leith Wheeler knew that something needed to change.

Leith Wheeler needed a method of automatically generating insightful, customized statements that reflected and reinforced their brand, while offering added value to their clients. In 2006, the firm engaged PureFacts to re-design their client statements and to completely overhaul their statement generation process.

SOLUTION APPROACH

As a key first step, PureWealth - PureFacts' flagship product - was used to create a single, integrated data warehouse to organize all of Leith Wheeler's data. PureWealth receives regular, automated data feeds from Leith Wheeler's other systems to ensure that this central database remains up-to-date and accurate.

Next, PureFacts and Leith Wheeler worked closely together to completely re-design their private client statements, tailoring them specifically to the firm's requirements. The flexible PureStatements reporting engine used to generate the statements automatically handles special rules and exceptions.

New institutional statements were also created. These statements incorporate sophisticated data from previously disparate systems, now integrated by PureWealth. For both client statements and institutional statements, many manual processes were eliminated, with corresponding reductions in cost, errors, and production time.

KEY BENEFITS

Today, Leith Wheeler's systems automatically generate modern, accurate, full-colour statements with the click of a button. Statements are personalized and present comprehensive data in an easy-to-read format tailored to institutional and private clients.

Leith Wheeler has found that their new statements enhance their marketing efforts, increase client satisfaction, and aid in client retention. As an added bonus, they are also easier, faster, and less costly to produce.

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CLIENT OVERVIEW



Founded in 1982 by Murray Leith and Bill Wheeler, Leith Wheeler Investment Counsel Ltd. is a value-based wealth management firm with over \$9 billion of assets under management.

Vancouver-based Leith Wheeler currently manages equities and fixed income for corporations, unions, professional organizations, universities, foundations and private clients across Canada.

WHY PUREFACTS?

PureFacts' unique combination of financial industry experience, business process expertise, and deep technical knowledge allowed them to design and deliver a robust, flexible system while also advising Leith Wheeler on current best practices. PureFacts also understood that client statements are a key customer contact point, and were committed to delivering an attractive, accurate statement package that Leith Wheeler would be proud to send to their clients.

FUTURE PLANS

Since the successful completion of this work, PureFacts and Leith Wheeler have undertaken a number of other projects together, resulting in improved management reporting, automated compliance processes, and further client service enhancements at the firm.

ABOUT PUREFACTS FINANCIAL SOLUTIONS

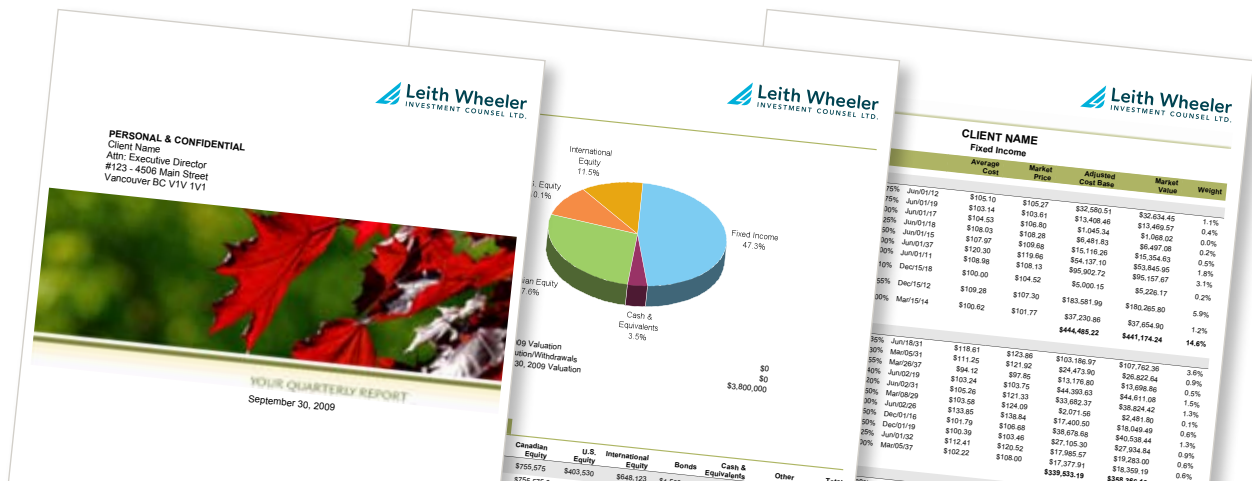
For over ten years, PureFacts has been successfully developing information management solutions to keep businesses responsive and nimble – both today and tomorrow.

We do much more than design and sell software. We bring CEOs and CIOs together through access to high quality, reliable and useful information on every aspect of operating and financial performance. When finance and information technology teams talk in terms both can understand, information quality improves – as does the ability to manage the enterprise.

This is where we come in. Not only will we help you build bridges within your business using collaborative tools everyone understands, but we'll also show you a healthy and consistent return on your investment.

“We are very pleased with the statements generated by the PureFacts system. They enhance our marketing efforts, contribute to client satisfaction and aid in client retention. As an added bonus, they are easier, faster and less costly to produce.”

- David Schaffner
President, CEO



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