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GlobalBridge Selects FolioDynamix for Asset Management Overlay Technology
New technology increases trust bank and wealth advisor productivity, decreases up-front costs

Minneapolis, Minn. – February 2, 2009. [GlobalBridge](#), a Minneapolis-based provider of separately managed accounts for trust banks and wealth advisors, announced today the selection of [FolioDynamix](#) as its asset management overlay technology provider and integrator of manager due diligence services.

Kelly Coughlin, CEO of GlobalBridge said, “For more than a year, we have searched for the right turnkey provider of overlay and unified managed account technology services, and have studied all of the key providers. FolioDynamix, which recently acquired [SunGard Advisor Technologies](#), was the hands-down winner.” Coughlin continued, “Their standard-setting technology, including a new desk-top proposal system along with our other technology enhancements, position GlobalBridge as the leader in the middle market trust bank, broker and advisor segments.” Coughlin expects that the technology will be fully integrated by the end of the first quarter. “Additionally,” Coughlin said, “By integrating our manager due diligence services, managers on our platform will gain access to a market segment we could not focus on previously. This is a win for our managers, our clients, FolioDynamix and GlobalBridge.”

Mike Winkel, President of FDx Advisors and director of due diligence services said, “The integration of our due diligence capabilities and manager rosters is great example of the benefits of functional synergies.” He added, “This relationship will benefit all of us: FolioDynamix, GlobalBridge, managers participating in the program, and most importantly, the banks, brokers, and advisors that use our platforms.”

Joseph Mrak, CEO of FolioDynamix said, “We are extremely pleased that GlobalBridge selected our technology. With a large and growing customer base of middle market banks and advisors that are looking for full platform customization, GlobalBridge knew that to step ahead of the competition, they had to meet this need without incurring the typically high up-front costs. With our overlay technology managers can devote more time to wealth-building and less to the

operational side of the business. And by working with GlobalBridge, they avoid those higher start up expenses.”

About GlobalBridge

GlobalBridge, based in Minneapolis, Minn. offers separately managed account (SMA) programs to trust banks and advisors for individual and institutional investors nationwide. GlobalBridge is the only program that offers complete open architecture in all major trust accounting systems, custodial relationships, investment vehicles, trading, and investment manager selection. For more information visit www.globalbridge.com

About FolioDynamix

Headquartered in New York, NY, with offices in Sacramento, CA and Philadelphia, PA, privately held FolioDynamix is changing the way sponsors, managers and advisors conduct business, efficiently and productively, in wealth management. With its [FDx and FDx Advisors](#) value propositions – a wealth servicing platform and registered investment advisor, respectively – FolioDynamix offers a seamless, scalable solution for any fee-based product. Providing daily oversight of more than 3.8 million accounts, FolioDynamix is also recognized as the industry’s leader in wealth servicing innovation, platform technology modernization, as well as the singular provider of a bundled or unbundled turnkey asset management program (TAMP). For more information on FolioDynamix, please visit www.foliodynamix.com.