

## **FOR IMMEDIATE RELEASE**

Bryson J. Pouw

Blaze Portfolio Systems

773-935-2470

[bpouw@blazeportfolio.com](mailto:bpouw@blazeportfolio.com)

### **BlazePortfolio Announces Agreement to Integrate Atom Align and Morningstar Office**

*Combined Offering Provides Real-Time Trading and Back Office Outsourcing to Financial Advisors*

Chicago, IL (September 17, 2012) – [BlazePortfolio Systems](#) announced that it has signed an agreement to provide access to BlazePortfolio’s streamlined rebalancing and trade order management system, Atom Align, to users of Morningstar Office, a global practice and portfolio management system for independent advisors. The agreement between the two Chicago-based firms delivers a comprehensive solution for investment advisors seeking operational efficiencies through seamless integration of portfolio management systems.

“We are excited to work with Morningstar to deliver streamlined rebalancing and trading technology to Morningstar Office users,” said BlazePortfolio president Bryson J. Pouw. “Advisors looking for an end-to-end solution can seamlessly add the modeling and straight-through trading capabilities of Atom Align to the portfolio management and customer relationship management (CRM) features of Morningstar Office.”

Michael Wilson, Morningstar vice president of advisor software, said, “BlazePortfolio’s mission to create great software and capabilities directly aligns with our mission to help advisors help their clients. We expect many of the more than 3,500 advisors that use Morningstar Office will benefit from the increased efficiency this integration will bring to their practices.”

Morningstar Office is a complete practice and portfolio management system for independent financial advisors, featuring robust portfolio management and performance reporting, advanced research capabilities, sophisticated investment planning, and intuitive CRM tools for batch reporting and secure communications using a Client Web Portal and document vault.

BlazePortfolio’s Atom Align is a multi-custodian, web-based modeling and trade order management solution with FIX connectivity, provided through SunGard. Atom Align offers registered investment advisors a unique solution complete with real-time order management and household model rebalancing for investment advisors, wealth management, trust, broker dealer, and multi-family office clients.

###

**About BlazePortfolio®**

BlazePortfolio Systems LLC, offers streamlined technology solutions to investment organizations including software products, seamless implementations and business process improvement consulting. Launched in 2005, BlazePortfolio brings more than two decades of experience in investment management operations and technology. The BlazePortfolio team has worked with more than 100 investment firms, ranging from individual advisors to global institutions. Visit BlazePortfolio online at [www.blazeportfolio.com](http://www.blazeportfolio.com) for more information.

***About Atom Align®***

BlazePortfolio's [Atom Align](#) is the industry's most advanced web-based modeling and trade order management solution for investment advisor, wealth management, trust, broker dealer, and multi-family office clients. Atom Align streamlines the portfolio and household model rebalancing process with its intuitive design and comprehensive features. The trading and OMS capabilities in Atom Align include real-time electronic trading via FIX (Financial Information eXchange) and execution management.

**About Morningstar, Inc.**

Morningstar, Inc. is a leading provider of independent investment research in North America, Europe, Australia, and Asia. The company offers an extensive line of products and services for individuals, financial advisors, and institutions. Morningstar provides data on more than 385,000 investment offerings, including stocks, mutual funds, and similar vehicles, along with real-time global market data on more than 8 million equities, indexes, futures, options, commodities, and precious metals, in addition to foreign exchange and Treasury markets. Morningstar also offers investment management services through its investment management subsidiaries and has more than \$186 billion in assets under advisement and management as of June 30, 2012. The company has operations in 27 countries.