



MONEY MANAGEMENT INSTITUTE

FOR IMMEDIATE RELEASE

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Money Management Institute (MMI) Selects Coates Analytics™ as the Industry Standard for Sales and Reporting Solutions

--Coates Analytics™ Chosen from Among Five Industry Leading Firms in a Competitive Review to Deliver the Industry's Premier Sales and Reporting Solution--

Washington, D.C., December 13, 2011 - Money Management Institute (MMI) announced that it has selected Coates Analytics, a division of Albridge Solutions, Inc., a BNY Mellon company, to be the supplier of a new industry standard sales and reporting solution. MMI and Coates Analytics have entered into an exclusive five-year marketing agreement that will allow Coates Analytics to be the provider of choice for both sponsors and money management companies that are members of MMI.

"This represents a major milestone for our membership. We believe carefully crafted analytics can revolutionize the way managed money products and programs are developed and distributed in the marketplace. We are very pleased to have selected Coates Analytics as the firm to deliver these analytical solutions to our membership," stated Christopher L. Davis, president of MMI. "The selection process was a rigorous one in which a number of firms responded to an RFP we sent to potential participants earlier in the year. Coates Analytics is the firm that our Board of Governors believes best addresses our members' interest in accurate sales information," added Mr. Davis.

The new initiative will grow the number of contributing MMI sponsor firms (broker-dealers) to broaden the breadth of business intelligence data that can be utilized by both asset managers and broker/dealers to increase the sales and distribution of fee-based products, as well as mutual funds and ETFs. The breadth of research and reporting that will be available to the MMI membership is expected to dramatically increase with the participation of more firms.

This initiative represents an enhanced and broadened role for MMI and Coates Analytics in the areas of sales and distribution intelligence. "We are extremely proud that Coates Analytics was selected as the provider of choice for this important initiative by MMI. We consider it a privilege to work with senior executives throughout this industry to enhance the use of analytics to drive successful business practices," added Dennis Kelleher, Head of Business Solutions for Coates Analytics. MMI and Coates Analytics will be working closely together over the next several months to consult with MMI member firms. "It's an exciting time for our members and we will develop a terrific partnership to provide solid benefits to our industry for years to come," added Mr. Davis.

About MMI

Since 1997 MMI has been the leading voice for the global financial services organizations that provide advice and professionally-managed advisory solutions to individual and institutional investors. Through industry advocacy, educational initiatives, regulatory affairs, data reporting and professional networking, MMI supports and advances the growth of advisory solutions. MMI members' advice-driven investment solutions serve an evolving worldwide financial landscape and their organizations are committed to the highest standards of fiduciary responsibility and ethical conduct. For more information, visit www.mminst.org.

About Coates Analytics

Coates Analytics, a division of Albridge Solutions, Inc., a BNY Mellon company is a business intelligence and analytics provider specializing in distribution, key accounts management, compliance, risk management and workflow solutions—exclusively for financial services firms. We are a market leader in three major technology solutions: Distribution Management System, Intelligent Dashboard and Subadvisor Certification Solution. Our Distribution Management System provides critical sales reporting and competitive market analytics to help asset managers identify their best distribution opportunities and analyze key drivers of profitability. The Coates Intelligent Dashboard offers exception-based processing and critical metrics in an intuitive display to help firms mitigate risk and evaluate performance. Our Subadvisor Certification Solution is a compliance workflow solution that streamlines the oversight of subadvisor relationships by standardizing the process of collecting, reporting and evaluating compliance data. For additional information on how Coates Analytics can help your firm succeed, visit www.coatesanalytics.com.