

## InvestorPOS launches new web site - more for advisors, asset managers, dealers and compliance officers

**Toronto, ON, April 30, 2012:** InvestorPOS Inc. has launched a new web site at [www.InvestorPOS.com](http://www.InvestorPOS.com), highlighting its suite of solutions for advisors, asset managers, investment fund dealers and compliance officers. First launched in October 2011 for financial advisors to access the complete universe of approximately 25,000 Fund Facts documents, the newly designed site outlines a variety of related solutions aimed at satisfying the Canadian Securities Administrators' (CSA) 3-Stage Point of Sale regulation (National Instrument 81-101) for the investment funds industry stakeholders:

- **Advisors** - Access the industry repository of Fund Facts to search for and send the most recently filed documents to clients for free, both electronically or printed and mailed
- **Dealers** - Cost saving solutions for multi-channel and compliant delivery of Fund Facts documents with the option to bundle Fund Facts with trade confirmations (Stage 2), as well as deliver documents at or prior to the Point of Sale (Stage 3)
- **Asset Managers** - Document composition and hosting/white label solutions for Fund Facts, MRFPs, Financial Statements and other documents as well as marketing and sales analytics surrounding document delivery activities
- **Compliance** - Reporting for dealers and branch managers monitoring document delivery activity at the national, regional, branch and account level. The suite of solutions for asset managers includes document composition and program management with print/mail and e-delivery for NI-81-101 Fund Facts/Trade Confirmations and NI-81-106 MRFPs/Financial Statements

“There are a number of parties affected by this new POS regulation”, said Anthony Boright, President of InvestorPOS Inc., “and we have leveraged technology to help each group become more efficient in their processes while reducing the costs associated with the traditional way of doing things. We continue to work with asset managers to streamline the document composition exercise with our online publishing platform and we are also working with dealers to help them take advantage of the cost savings afforded by Stage 2 (delivering the Fund Facts to clients in lieu of the simplified prospectus along with the trade confirmation) and prepare for Stage 3 (delivery of the Fund Facts document at or prior to the point of sale). We developed our FFdelivery™ platform with Stage 3 in mind and so dealers are able to follow our road map in a phased implementation.”

“Since the launch of our Fund Facts repository this Fall, advisors have been registering on the site to take advantage of its search capability, as well as a ‘Quick List’ for sending their favorite Fund Facts and reporting analytics to show which of their clients were reviewing the documents. To celebrate the launch of the new web site and encourage other advisors to try InvestorPOS, we’re giving away three iPads to advisors - the perfect business tool for the mobile sales force. Advisors can register for the contest at <http://www.investorpos.com/Advisors>.

### About InvestorPOS™

InvestorPOS™ is a hosted, Software-as-a-Service (SaaS) solution and suite of modules that allows asset managers and dealers to efficiently create and deliver Fund Facts and other disclosure documents to investors. To learn more, please contact [info@investorpos.com](mailto:info@investorpos.com)