



## Stanford Financial Group live with Odyssey Wealth Management Solution

### New York, 17 January 2008 -

Odyssey Financial Technologies, a global provider of Private Wealth, Separately Managed Accounts/Unified Managed Accounts, and Asset Management solutions and services, is pleased to announce that Stanford Group Company has now gone live with Odyssey's Portfolio and Relationship Manager Workstations. Stanford Group Company is a member of Stanford Financial Group, a global network of financial services companies.

Odyssey's Portfolio and Relationship Manager Workstations are an ideal solution for firms requiring a full service platform supporting high-net-worth and affluent investors. The solution provides wealth managers with sophisticated portfolio management overlay capabilities supporting large volumes of accounts across multiple currencies and asset classes. This allows portfolio managers and advisors to focus on what they do best: overlay management and generating returns for their clients.

Stanford Group Company chose Odyssey Wealth Management Solutions to support its new High-Net-Worth and Ultra-High-Net-Worth products, Unified Managed Account (UMA) and wealth management strategy across the US, South America and Europe, based on linked Odyssey Component Suite hubs in Houston, Texas and Zurich, Switzerland.

### About Stanford Financial Group

Stanford Financial Group is a privately held, wholly owned global network of independent, affiliated financial services companies led by Chairman and CEO Sir Allen Stanford. The first Stanford company was founded by his grandfather, Lodis B. Stanford in 1932. Stanford's core businesses are private wealth management and investment banking for institutions and emerging growth companies. The Stanford Financial Group of companies provides private and institutional investors with global expertise in asset allocation strategies, investment advisory services, award-winning policy and equity research, international private banking and trust administration, commercial banking, investment banking, merchant banking, institutional sales and trading, real estate investment and insurance. Stanford has over \$43 billion in assets under management or advisement. Stanford Financial has made it a priority to invest in the communities in which it operates across the globe through signature corporate philanthropy initiatives with non-profit organizations such as St. Jude Children's Research Hospital and countless local and national charities that strengthen communities. Securities products and services are offered in the United States through Stanford Group Company, a member of FINRA/SIPC. Stanford Financial Group is not a legal entity, but a registered trademark which encompasses the global network of independent, but affiliated, privately held and wholly owned entities. More information on the company can be found at [www.stanfordfinancial.com](http://www.stanfordfinancial.com).

The initial implementation catered for 1,500 users, including Portfolio and Relationship Managers, as well as various support and administration staff. This number has since grown to 1,700 users and should continue to increase in the foreseeable future.

"As a provider of investment services, the ability to offer UMAs to our Financial Advisors and clients was critical," said **Zack Parrish**, Executive Director, Wealth Management, for Stanford Group Company. "We chose Odyssey's Portfolio and Relationship Manager Workstations because the solution provides us with an integrated UMA and wealth management platform that helps us standardize key processes such as model generation and rebalancing across our client base."

"Stanford Group is positioned for success in the UMA segment of the wealth management industry, one of the fastest growing investment channels in North America," states **Antoine Duchateau**, Odyssey Chairman and CEO. "Odyssey's solutions enable Stanford Financial Group to compete effectively with UMA by eliminating routine processes and providing the ultimate tool set, enabling investment managers and financial advisors to focus on value-added services and comprehensive wealth management services."

### About Odyssey Financial Technologies

Odyssey is an industry leader in the global provision of private wealth and asset management solutions and services. More than 180 financial institutions in 30 countries have chosen Odyssey solutions; of the top 25 European banks, 15 are Odyssey customers. Odyssey focuses on providing a comprehensive range of components for portfolio management, advisory, customer relationship, compliance, risk, and analytics. The components are deployed on a single scalable wealth and asset management platform, facilitating the enterprise-wide implementation of solutions and data management. Founded in Luxembourg in 1995, Odyssey has offices in the key financial centres, including London, New York, Toronto, Singapore, Zurich, Frankfurt, Brussels, Geneva, Madrid and Tokyo. Odyssey's operational head office and main development centre is located in Lausanne, Switzerland. Throughout this knowledgeable network Odyssey employs more than 450 professionals. For further information, please visit: <http://www.odyssey-group.com>.

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