



PlanPlus Inc.

FOR IMMEDIATE RELEASE

PlanPlus Web Advisor™ Selected as Financial Planning Tool for Altamira Investment Services

TORONTO, ONTARIO – PlanPlus Web Advisor™ has been selected as the financial planning tool for Altamira Investment Services. Altamira currently serves thousands of individual investors across Canada.

“A good financial planning tool is the key to assessing Altamira client needs and formulating solutions for them in order to achieve their goals. The Investment Policy Statement (IPS) in particular plays a significant role as such. It has become the ‘roadmap’ for Altamira customers and their financial futures”, said Anne Wildfong, Vice-President of Private Wealth at Altamira.

“The implementation for Altamira included integration to their proprietary back office to allow the regular update of the customer holdings in PlanPlus Web Advisor™”, said Shawn Brayman, President of PlanPlus Inc. “Altamira tailored our solution, which they branded LifePlan™, to maximize the efficiency for their advisors.”

“Altamira selected PlanPlus as its partner in delivering a financial planning solution to its high net worth clients because of the excellence of Web Advisor™. The implementation of PlanPlus Web Advisor™ within Altamira allows our advisors to provide better plans and solutions for our clients”, said Wildfong.

About PlanPlus Inc.

PlanPlus Inc. is a Canadian firm that provides wealth management and financial planning solutions based on their *PlanPlus Web Advisor™* software to financial services firms worldwide. PlanPlus has users in North and South America, the Caribbean, Asia and Europe. Customers include banks, stock brokers/investment firms, insurance, credit union, mutual fund and financial planning firms.

As well as professional software solutions, *PlanPlus for Students™* is an educational planning package used by colleges, universities and professional associations teaching financial planning principals and skills in Canada and internationally.

PlanPlus is a Canadian company established in 1990. It is privately owned and located in Lindsay, Ontario.

About Altamira Investment Services

Altamira is a leading investment services company, offering a wide range of mutual funds, savings products, financial planning and managed portfolio services. Award-winning client service, product innovation and expert advice define Altamira's distinctive approach to investment management. The company is headquartered in Toronto with offices across the country, and is a subsidiary of the National Bank of Canada. <http://www.altamira.com/>

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