



**FOR IMMEDIATE RELEASE**

**THOMAS PARTNERS LIVE WITH INDATA iPM  
FRONT OFFICE SOLUTION**

**Firm leverages portfolio modeling, compliance and trade order  
management capabilities of INDATA to maximize proprietary portfolio  
management strategies**

Greenwich, CT — July 12, 2011 -- [INDATA](#), a leading industry provider of software and services for buy-side firms including trade order management (OMS), compliance, portfolio accounting and front-to-back office today announced that ThomasPartners, Inc. based in Wellesley, MA is now live with the INDATA iPM Front Office.

After due diligence on a number of OMS/EMS vendors, ThomasPartners selected INDATA based on its flexible workflow, customization capabilities and interface with the firm's current back office system, PortfolioCenter®, from Schwab.

"At ThomasPartners we are exclusively focused on the construction of growth-oriented investment portfolios that generate significant current dividend income streams in our portfolio management approach. One of the advantages of INDATA over other systems was the ability to integrate our proprietary analytics into their modeling and trading tools," commented William P. McMahon Jr., President/CIO. "In addition, the system is easy to use and interfaces with our current back office system from Charles Schwab. iPM also provides proactive data management tools and alerts which help to screen the data flows between the two systems providing a high level of transparency for our portfolio managers," he added.

"For portfolio managers, customization and flexibility is key," commented David J. Csiki, Managing Director, INDATA. "With iPM, we approach each relationship uniquely and build in workflows that are specific to each client. Firms like ThomasPartners understand the importance of having technology that adapts to their unique needs rather than having a one size fits all approach. We are very pleased to have them as a client," he added.

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### **About ThomasPartners**

ThomasPartners, Inc., headquartered in Wellesley, MA, provides asset management and investment advisory services to individuals, foundations, and other advisory firms. The firm serves clients in all 50 states and has about \$1.6 billion in client assets under management. The firm is independently owned.

### **About INDATA**

INDATA is a leading industry provider of software and services for buy-side firms, including trade order management (OMS), compliance, portfolio accounting and front-to-back office. INDATA's iPM – Intelligent Portfolio Management technology platform allows end users to efficiently collaborate in real-time across the enterprise. The company's mission is to provide clients with cutting edge technology products and services to increase operational efficiency while reducing risk and administrative overhead.

INDATA provides software and services to a variety of buy-side clients including asset managers, registered investment advisors, banks and wealth management firms, pension funds and hedge funds. Assets under management range from approximately \$25 million to over \$80 billion across a variety of asset classes (i.e. equity, fixed income, etc.) both domestic and international. For more information, please visit [www.indataipm.com](http://www.indataipm.com) or follow us on Twitter: @indataipm.

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