

Asset International (AI) Acquires Plan For Life, Australian Supplier of Mutual Fund and Insurance Business Intelligence Data

Strong synergies with AI's Strategic Insight unit

JANUARY 4, 2011, New York – [Asset International, Inc.](#) (AI), a global provider of data and analytics, workflow tools, research, marketing support and events for the asset management industry worldwide, has acquired [Plan For Life](#), a leading provider of business intelligence data and research for the Australian managed fund and life insurance markets.

Headquartered in Melbourne, Plan For Life (PFL) is the foremost independent source of sales and related data on the managed fund and life insurance markets in Australia and New Zealand for fund managers, life offices, analysts, dealer groups and government bodies.

Simon Solomon, Founder and Managing Director of Plan For Life, commented, “Joining forces with Asset International is an exciting opportunity for me and my team at PFL, the company I started more than 20 years ago. AI’s asset management focus, passion about data, close customer relationships and global resources will facilitate the expansion of our services to our many friends and clients.”

Plan For Life will become part of AI’s Strategic Insight (SI) division, the New York, London and Hong Kong-based supplier of data, tools, and research to the global asset management industry.

As examples of anticipated synergies, Mr. Solomon cited Plan For Life’s ability to introduce Strategic Insight to its more than 100 clients in Australia, the world’s fourth largest mutual fund market. Plan for Life’s data also will be incorporated into Strategic Insight’s global services, and the combined firms’ Melbourne and Hong Kong Offices are expected to enhance service coverage of AsiaPac clients. “There is an increasing interest among many investment managers around the world to participate in the growth of the Australian asset management industry,” Mr. Solomon observed.

According to Jim Casella, Asset International’s Chief Executive Officer, “Plan For Life allows us to expand our services as a primary resource of business intelligence for asset managers and asset owners worldwide.” He observed that Plan For Life shares valuable attributes with AI’s other divisions, including an asset management focus, market leadership, loyal customers served over decades, and unique business intelligence data distinguished by its depth and integrity.

Jag Alexeyev, Senior Managing Director of Strategic Insight Global commented, “PFL and Strategic Insight have assisted the mutual fund industry for more than two decades and share cultural affinities. This acquisition anchors our future collaboration and provides Strategic Insight with an opportunity to offer detailed Australian data to more than 250 subscriber organizations in Asia, Europe and the US, as well as bring our timely global insights to Australian clients.”

Daniel Enskat, who leads Strategic Insight’s global consulting from AI’s recently opened Hong Kong office, suggested that Australia offers lessons and opportunities to the retirement savings industry around the world, noting that Australia already enjoys the highest household ownership of mutual funds among developed nations (averaging about \$150,000 per household, significantly above even the maturing US).

Mr. Casella, Asset International CEO added that AI, with financial backing from Austin Ventures and a credit facility with Goldman Sachs, continues to look to add to its strong organic growth with additional acquisitions of specialized information providers to the asset management industry worldwide. “Through AI’s companies, global asset managers can now access a broad spectrum of business intelligence information and technology in a comprehensive rather than fragmented manner,” he

asserted.

About Asset International

Asset International is a privately-held provider of information and technology to global pension funds, asset managers, financial advisers, banking service providers, and other financial institutions in the private and public sector. Its industry-leading brands include Strategic Insight, SIMFUND, PLANSPONSOR, PLANADVISER, aiCIO, Global Custodian, and The Trade. The company has offices in New York, Hong Kong, London and Stamford, CT. For additional information please contact Jason Cassidy at jcassidy@assetinternational.com (+1-212-584-5739).

About Plan For Life

Headquartered in Mount Waverley, just outside of Melbourne Central Business District, Plan For Life is the foremost independent source of information on managed funds and the life insurance market in Australia and New Zealand for fund managers, life offices, analysts, dealer groups and government bodies. For additional information please contact Rael Solomon at rsolomon@planforlife.com.au (+61-3-9886-4400).