



Heritage Turns to SalesPage for CRM That Fits Their Business

SalesPage Financial helps mutual fund company strengthen client relationships

MICHIGAN - November 13, 2007 - Heritage Asset Management, Inc., has selected SalesPage Technologies as its Customer Relationship Management (CRM) partner. Heritage and its affiliate, Eagle Asset Management, Inc., will capitalize on the power of SalesPage Financial, a software solution tailored specifically for the financial services industry, to better manage its transaction data and relationship information to meet client needs efficiently, effectively and accurately.

"In order to maximize our relationships with our clients, we needed a CRM solution that allowed us to consolidate all of our major business functions and to house all of our data on one comprehensive platform," said Matt Calabro, senior vice president of operations for Heritage. "The SalesPage Financial solution not only meets this need, it also allows our team to take client interactions to the next level by delivering mobile solution access and providing tools to analyze all of the data we capture."

According to Calabro, several key features of the SalesPage Financial solution led Heritage to its choice, including the ability to:

- Consolidate client information. Handling mutual fund and separate account, product and transaction data as well as CRM data, SalesPage Financial exposes client tendencies, interactions and transaction history in a single database. Heritage intends to aggregate its mutual fund activity with the separate account activity of its affiliate, Eagle Asset Management, Inc. With aggregations of all of this data, Heritage and Eagle employees are better equipped to serve clients based on their defined preferences and to match interests with its products.

- Easily mine customer data. The SalesPage Financial Analytics module provides instant, free-form access to underlying data, allowing Heritage and Eagle employees to quickly analyze and monitor trends so they can proactively address new opportunities and issues.
- Go mobile. With SalesPage Mobile, users can interact with the SalesPage Financial solution when and where necessary – letting them effectively serve their clients in real time.

"We're proud to add Heritage and Eagle to the list of great financial institutions we serve, which already includes names such as ING, JPMorgan, Legg Mason and Principal," said Michael Pessetti, vice president of sales and marketing for SalesPage Technologies. "SalesPage Financial is the most comprehensive, readily tailored relationship management package available, and we are privileged to contribute to the success of the industry's most powerful asset management companies, annuities providers and insurance firms."

About SalesPage Technologies, LLC

Founded in 1983, SalesPage is committed to providing companies with effective CRM applications and related technical services. SalesPage collaborates with each client to plan, build and implement a tailored, browser-based CRM solution. Each client's solution starts with the award-winning SalesPage foundation, then integrates the client's own best strategies, leveraging their existing technology investments and readily adapting as the client's needs change and grow. The company's growing list of global business partners for SalesPage solutions includes Federated Investors, ING Funds, JPMorgan, Deutsche Bank, Entergy, Friday Ad, Twinings, Scottish and Southern Energy and the University of Central England.

About Heritage Asset Management, Inc.

Founded in 1985, Heritage currently manages more than \$10 billion in assets for individual and institutional clients through a diverse family of open-end mutual funds. Showing steady growth over the years, Heritage has delivered superior long-term performance while employing consistent, conservative investment management strategies. The company has developed strategic alliances with nationally recognized

money management firms that share a commitment to clients in order to deliver seasoned, professional money management. For more information visit www.heritagefunds.com.