



Gill Capital Partners

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Gill Capital Partners – Efficiency through technology growth.

In this unpredictable market, Gill Capital Partners has grown, both in revenue and client capacity by aligning with best-in-category (best-in-class) technology partners. When it comes to technology, the managing partners' philosophy is to build technology for growth – implementing software and systems for where they want to be in a year, not where they are now. To that end, Gill Capital Partners invests upwards of \$75K in technology advancements each year – the second-highest expense, next to payroll. Says managing partner James O'Brien, *"Investing in technology is reinvesting in the business."*

Though the firm's partners make technology decisions, employees who will be using the programs get involved in research and testing. Technology selection criteria include: value, ease of use, ability to customize, cloud functionality, compatibility with existing programs in use, and impact on day-to-day efficiency. Gill Capital Partners' goal is to build a technology infrastructure that will create efficiencies and eliminate room for error – freeing up employees to do more in a day.

Gill Capital Partners' investment, and "build-for-growth" approach is rare for a firm of their size (seven full-time employees and a half-dozen contractors), but continues to differentiate them from competitors while solidifying client relationships. *"Every decision we make is about making more time to focus on our relationships,"* says John Winslow, managing partner.

In the past two years, Gill Capital Partners has aligned with the following partners offering technology solutions:

- **Prima Capital** > Partnering with Prima Capital allows Gill Capital Partners to provide due diligence on managed funds, which is imperative. The Prima Asset Allocation Guide compares the Gill Capital Partners' investment models to prospective clients' current portfolios, showing prospects the Capital Difference. According to Gill Capital Partners' Darin Snow, *"Having in-depth due diligence is important in this day and age. Advisors, and their clients, need to know who's managing the money and that they are being supervised."*

Prima Capital president, Gib Watson explains, “A primary growth driver in Prima’s business is the independent RIA advisor channel as it continues to expand. PrimaGuide Plus is beginning to gain traction with advisors as they recognize that their time is best spent interacting with clients rather than hiring and managing a team of CFAs to travel and vet investment strategies. Now more than ever technology is making it easier for advisors to pull together best of breed providers of wealth management services.”

- Result: The power of eight-to-ten CFAs at a fraction of an FTE. **Salesforce.com**. Through a custom built interface, Gill Capital Partners; team manages client correspondence, marketing efforts, employee time management, client service tasks and more.

Result: Increased efficiency by one full-time employee.

- **Charles Schwab Advisor Services & Bloomberg** > Pairing these partner interfaces increases trading and compliance efficiencies. Trades are communicated to Schwab via Bloomberg Execution Management System.

Result: An audit trail and reporting for best execution.

- **Black Diamond Performance Reporting** delivers customized performance reporting that is distributed with one click of a button. Relationship managers spend more time with clients and less time running and reconciling reports.

Result: Saved one FTE and are able to get daily downloads and reconciliation.

- **eMoney Advisor** > A custom online portal for EncompassSM, Gill Capital Partners’ planning and aggregation tool, this tool allows clients password-protected access to their account information, legal documents and more. By downloading proprietary portfolio models, Gill Capital Partners links models to allocations, run financial planning reports and more.

Result: Clients have easy access to real-time information on ALL financial holdings.

Gill Capital Partners’ technology purchases and upgrades have created a virtually paperless environment. (Documents pre-dating the upgrades were scanned into e-files in accordance with standard industry compliance.) All technology applications talk to one another, so it’s a write once, read anywhere system with Salesforce.com as the backbone for operations and trades.

About Gill Capital Partners. Gill Capital Partners is an independent Colorado financial services firm, serving clients since 1983. Gill Capital Partners has three distinct lines of business: Wealth Management for the individual investor; Institutional Services for banks and public entities (including Colorado municipalities); and Corporate Services for entrepreneurs and established businesses. Gill Capital Partners helps you plan, predict, protect, your future one day at a time.

To learn more about the Capital Difference, please contact Gill Capital Partners at 303.296.6260 or www.gillinvest.com. Member: FINRA-SIPC.

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