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CONFERRE
S O L U T I O N S

Press Release

Conferre Solutions developed to take consulting services to the next level

Craig L. Kolzow, 20 year industry expert with a passion for innovation and technology, now provides top-level consultation

Denver, CO, March 14, 2008: With a name derived from the Latin word meaning “to bring together,” Conferre Solutions is Kolzow’s vision for professional consulting based on leveraging technology and outside-the-box thinking. Mutual fund companies and brokerage firms of all sizes benefit from his decades of experience in:

- Operations
- Intermediary Oversight
- Cost Reduction
- Efficiency
- Service Level Improvement
- Risk and Control Improvement

Highly-Qualified and Passionate Consultant

His dedicated service to the mutual fund securities industry provided Mr. Kolzow with valuable experiences. He devoted almost 10 years to Charles Schwab & Co, Inc as mutual fund operations group VP, and most recently, lead Schwab’s fast growing Mutual Fund Clearing Services operational group in Denver, CO. He provided the vision and strategy behind much of Schwab’s transition to leveraging National Securities Clearing Corporation (NSCC) Mutual Services, to enhance efficiency, cost reduction and service improvement for Schwab clients owning mutual funds. He skillfully prepared Schwab’s proprietary fund family (Schwab Funds and current Laudus Funds) for portability and external intermediary distribution while overseeing the transfer agent for the funds.

- More -

For Immediate Release

Mr. Kolzow also played a key leadership role in the launch of Schwab Clearing's Omnibus Load Fund offering, by converting over 5,500 CUSIPS across more than 100 Fund Families into an omnibus relationship for one of Schwab's clearing correspondents.

Recent Achievements

Mr. Kolzow's efforts over the past two years earned him recognition as the leadership, vision, and strategy around Schwab's Omnibus transparency efforts, leading to the development of the current real time Schwab Trade Activity Portal. This development was expanded to support Schwab's needs in meeting the new SEC Rule 22c-2 requirements. He also lead the development and implementation of Schwab's new automated traded restriction logic, which now systematically restricts clients who trade mutual funds frequently based on customized Fund company criteria.

Throughout his career, Craig Kolzow has remained an active member of the fund industry's Investment Company Institute (ICI), as a member of the Broker Dealer Advisory Committee among others. Other professional industry associations include the National Investment Company Services Association (NICSA).

Conferre Solutions

Conferre Solutions promises to be an opportunity to showcase Craig Kolzow's passion for mutual fund securities consulting. His dedication to the industry over the past 20 years will be an enormous benefit to his clients, and they will find his industry knowledge and entrepreneurial spirit to be unmatched.

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