

# **Bond Case Briefs**

*Municipal Finance Law Since 1971*

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## **Lumesis and Ipreo Announce Partnership to Deliver Time-of-Trade Disclosure Solution.**

via PRWEB – Lumesis Inc., a leading provider of data, business efficiency and regulatory compliance solutions for the municipal market, has announced a strategic partnership with Ipreo, a leading global provider of workflow solutions and market intelligence to financial services and corporate professionals. The two companies will now offer direct access to DIVER Advisor Municipal Bond Reports directly from Ipreo's Bookrunning system.

"This partnership brings a solution for time-of-trade disclosure regulations directly into the Ipreo new issue workflow," said Gregg L. Bienstock, Esq., CEO and Co-Founder of Lumesis. "Delivery of the Official Statement does not address disclosure obligations, so Ipreo users will benefit from the simplicity of accessing our comprehensive muni bond reports for new issue compliance."

The DIVER Advisor Municipal Bond Reports are the only solution to efficiently address the MSRB Time-of-Trade Disclosure Rule (G-47), amended Suitability Rule (G-19) and Supervisory requirements (G-27). The reports are comprehensive, CUSIP-driven municipal bond overviews for over 1.1 million bonds. A subscription to DIVER Advisor is available immediately through the Ipreo and Lumesis sales teams.

"Streamlining our clients' workflow through the integration of data and software is the core premise of our solutions," said Allen Williams, EVP & Managing Director, Global Fixed Income Capital Markets at Ipreo. "Having the DIVER Advisor reports directly available from our bookrunning application enhances our clients' compliance efforts in keeping with new regulations."

### **About Ipreo**

Ipreo is a global leader in providing market intelligence, data, and technology solutions to all participants in the global capital markets, including sell-side banks, publicly traded companies, and buy-side institutions. By combining state-of-the-art new issuance systems with the premier global financial and investor data, Ipreo enables our capital markets clients to execute deals more efficiently, maximizing time and resources. Our applications include end-to-end bookbuilding systems, roadshow & conference management platforms, and electronic document delivery. Additionally, Ipreo's suite of investor prospecting and CRM solutions offer the most accurate and comprehensive institutional contacts data and profiles in the industry. Ipreo is the only financial services provider to offer solutions across all asset classes for the Equity, Fixed Income, Municipal, and Syndicated Loan markets. Ipreo is private-equity held by Blackstone and Goldman Sachs Merchant Banking Division, and has more than 800 employees supporting clients in every major financial center around the world. For more information, please go to <http://www.ipreo.com>.

### **About Lumesis, Inc.**

Lumesis, Inc. is a financial technology company focused on providing business efficiency, data and regulatory solutions to the municipal bond marketplace. Founded in 2010, Lumesis is completely dedicated to serving the municipal market with industry-leading analysis and compliance solutions

that meet the needs of an evolving regulatory environment. Today, the company's DIVER platform helps over 100 firms with over 30,000 users efficiently meet credit, regulatory and risk needs. Lumesis investors include Safeguard Scientifics, Inc. SFE, -0.28% Learn more at <http://www.lumesis.com>

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