

**Press Release**

## *Advisor Software extends capabilities of its Client Acquisition Solution with Release 2.7*

**SMA's, Investment Policy Statements, Monte Carlo take client acquisition application to the next level**

**Lafayette, California – 5/24/2004** – Advisor Software, Inc. (ASI) today announced details of a significant new release of their Client Acquisition Solution, further extending the application's strengths in product coverage, investment analytics, and flexibility.

ASI's Client Acquisition Solution provides advisors with actionable, personalized investment advice for their clients and prospects, to provide better client service and increase new assets. With Release 2.7 of the application, the range of products supported within the application expands still further to include Separately Managed Accounts (SMA's), so the application can fully analyze each client's portfolio across a full range of products, and construct portfolios which take advantage of a broad range of product alternatives, including SMA's, ETFs, Mutual Funds, and individual securities.

ASI has also added further horsepower to the diagnostics and analytics within the application, with the addition of a Monte Carlo Asset Simulation module, which provides an assessment of the current and proposed portfolios over a time horizon, including upside, median, downside portfolio values and value-at-risk expressed as a potential one-year loss.

ASI has also continued to streamline the portfolio construction process, and to allow for tremendous flexibility for the advisors in the process. Release 2.7 includes the ability for advisors to create, save and reuse their own model portfolios and investment universes, greatly improving the efficiency of the process for advisors. The application also includes a "normalization" function, which efficiently solves the often complex equation of allocating investment funds across selected securities.

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Finally, ASI continues to enhance the output from the Client Acquisition Solution. ASI's investment proposals, which have set a new industry standard, are now enhanced with the addition of customized Investment Policy Statements which can automatically be generated for each client.

### **About Advisor Software**

Advisor Software, Inc. (ASI) was founded in 1995 by Andrew Rudd (Founder, Chairman and former CEO of Barra, Inc.) to deliver institutional-strength analytics and advice to the individual investor and the advisors who serve them. ASI's advice technology is designed for a wide range of broker-dealers, banks, insurance companies, online brokerages, and other financial institutions, enabling these institutions and their advisors to deliver more insightful, actionable investment advice and build stronger, more profitable client relationships. ASI is a privately held company headquartered in Lafayette, California.

For more information, please visit ASI's website at <http://www.advisorsoftware.com>.

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