

Press Release

## *eMoney Advisor Teams with Advisor Software, Inc. to Provide Investment Strategy and Proposal Capabilities on its Wealth Planning and Management Platform*

### ASI Client Acquisition Solution Available to Financial Advisors through Seamless Integration with eMoney's AdvisorPlatform

**Conshohocken, PA and Lafayette, CA** – April 25, 2004 - eMoney Advisor, a leading provider of holistic wealth planning and management solutions, today announced that it has signed a letter of intent to partner with Advisor Software, Inc., a leading provider of investment strategy and proposal applications, to make top-tier analytics and investment advice available through its AdvisorPlatform.

“ASI is an industry leader in providing investment tools and portfolio advice for advisors,” said Edmond Walters, CEO of eMoney Advisor. “They are an excellent partner for us and will allow us to provide a significantly enhanced investment strategy capability to our customer base.”

eMoney's AdvisorPlatform provides financial advisors with a Web-based wealth planning tool that offers a comprehensive view of a client's financial portfolio, as well as features and functions that enable more complete planning and better servicing of each client's needs.

ASI's Client Acquisition Solution improves advisors' ability to provide insightful portfolio analysis and actionable investment advice to clients, acquire new clients, and promote preferred product offerings. The solution walks advisors through a logical workflow which culminates with the production of compelling, tailored investment proposals for existing and prospective clients in a way that clearly demonstrates the benefit of diversification strategies and selected investment products.

“By combining ASI's Client Acquisition Solution with eMoney's AdvisorPlatform, clients' investment strategies and portfolios will be fully integrated and synchronized with their overall wealth management plan and financial goals,” said Andrew Rudd, CEO of Advisor Software. “This adds a tremendous amount of value to the client.”

Contact us at 925.299.7782 or visit us at [www.advisorsoftware.com](http://www.advisorsoftware.com)



### **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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### **About eMoney Advisor**

Headquartered in Paoli, PA, eMoney Advisor is a leading provider of holistic wealth planning solutions that focus on maximizing the advisor-client relationship. eMoney Advisor combines expert consulting and innovative technology to deliver comprehensive wealth planning solutions and services that leverage more than two decades of financial planning and wealth management experience. eMoney Advisor's solutions are enhancing advisor-client relationships for a variety of financial services companies serving thousands of high-net-worth clients throughout the country. For more information on eMoney Advisor, visit [www.emoneyadvisor.com](http://www.emoneyadvisor.com).

#### **eMoney Advisor**

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