

**Press Release**

## *NBC Securities Selects Advisor Software to Provide Investment Planning and Proposal Capabilities for its Trust Group*

**Lafayette, CA – June 17, 2004** - Advisor Software, Inc. (ASI) announced today that NBC Securities, a regional broker dealer and a subsidiary of Alabama National BanCorp, has selected ASI's Client Acquisition Solution for its trust group.

Investment advisors will have access to ASI's application to provide clients with powerful portfolio diagnostics, asset allocation, portfolio construction, and branded investment proposals. The Client Acquisition Solution allows advisors to incorporate the full range of investments, including mutual funds, exchange traded funds (ETFs), separately managed accounts (SMAs), and individual securities.

"We are excited to be working with Advisor Software, given its heritage and position within the wealth management marketplace," said Jeff Beary, Director of Operations for NBC. "ASI enables our company and advisors to offer sophisticated and flexible proposals and investment policy statements for our important clients and prospects."

"NBC Securities is a very well respected organization across the Southeast," said Andrew Rudd, CEO of Advisor Software, Inc. "We are very pleased that they have selected ASI to help them win new clients."

### **About NBC Securities**

NBC Securities, Inc. is a registered broker dealer, member NASD, SIPC. It is also a registered Investment Advisor with the Securities and Exchange Commission, and offers a full array of financial products and services. As a wholly owned subsidiary of National Bank of Commerce and as part of Alabama National BanCorporation, it serves a variety of clients, ranging from financial institutions to individual investors. [www.nbcsecurities.com](http://www.nbcsecurities.com)

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



### **About Advisor Software, Inc.**

Advisor Software, Inc. (ASI) was founded in 1995 by Andrew Rudd (Founder and former Chairman and CEO of Barra, Inc.) to deliver institutional-strength analysis and advice to the individual investor. 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 focused on helping clients address specific, critical business issues and objectives, both those related to client acquisition and those related to client management.

For more information, please visit ASI's website at [www.advisorsoftware.com](http://www.advisorsoftware.com) or contact Bill Banks at [bbanks@advisorsoftware.com](mailto:bbanks@advisorsoftware.com).

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

