

**Press Release**

## *MoneyMate and Advisor Software, Inc. Join Forces to Offer Powerful Investment Advice Tools to the U.K. and European Markets*

**Lafayette, California and Dublin, Ireland** – 1/15/2004 – Advisor Software, Inc. (ASI) and MoneyMate Limited announced today that they have formed a partnership to provide European financial advisors and institutions with powerful investment analytics and advice applications. MoneyMate, a European provider of fund data and solutions, will provide marketing and distribution of ASI's Portfolio Construction Solution throughout the U.K. and Europe.

ASI's Portfolio Construction Solution provides analytics and functionality to facilitate the creation and delivery of insightful investment advice – for advisors and direct channel investors. ASI's broad-based advice offering includes risk assessment, portfolio analytics, asset allocation, portfolio construction, rebalancing, and proposal generation.

MoneyMate's distribution strategy has two components. For Independent Financial Advisors (IFAs) in the U.K., MoneyMate will offer direct access to ASI's Portfolio Construction Solution via the MoneyMate Interactive web site, for a monthly fee. MoneyMate's institutional sales force will offer the application directly to banks, brokerages, insurance companies, fund companies and other financial institutions.

"MoneyMate is a leader in the European markets, and they understand the value of applying sound analytics to the investment process," said Andrew Rudd, CEO of Advisor Software. "We have a great business opportunity in Europe, and we are extremely pleased to be working with MoneyMate as our partner in this effort."

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



“Our clients have been asking us for advice tools for some time,” said Stephen Byrne, Managing Director of MoneyMate, “and ASI is the best for high-end analytics, flexible software, and intuitive workflows – that’s what our clients want.”

### **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>.

### **About MoneyMate**

MoneyMate is a leading provider of tailored, customer-focused and innovative fund solutions to the European fund industry since 1991. With twelve years of experience in the European fund industry, MoneyMate has developed a range of cutting edge technology and fund data solutions. These solutions focus on driving fund sales, increasing client transactions, reducing data costs, centralising data feeds, accelerating time to market and delivering a competitive edge. MoneyMate has over 300 clients across Europe including the leading banks, fund managers, brokers, fund supermarkets and online fund platforms.

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