ASI ADVISOR SOFTWARE

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ASI Portfolio Rebalancing Solution Now Available to Schwab Institutional Clients

Time-Saving Rebalancing Tool Will Help Advisory Firms Scale for Growth, Optimize Client Relationships

FPA Seattle 2007, Seattle, Wash. – September 10, 2007 -- Advisor Software, Inc., a leading provider of wealth management solutions for the advice market, today announced that Schwab Institutional will offer ASI Portfolio Rebalancing Solution^{sm} on www.schwabinstitutional.com. The application, Schwab Institutional's Portfolio Rebalancer, will be available to all advisors using the Schwab Institutional platform.

With the new solution, advisors can:

- rebalance securities, including equities, mutual funds, ETFs, fixed income and cash, using real-time prices on positions;
- select batches of accounts, single accounts and even households, with the ability to define households for rebalancing;
- construct, import and maintain models for securities-based and target-asset allocation portfolios; and
- import proposed trades into the Web Trading Applet for validation and execution.

"Integrating ASI Portfolio Rebalancing Solution into schwabinstitutional.com makes it easier for advisors to automate important portfolio maintenance tasks, which furthers our commitment to help advisors increase back-office efficiency and achieve long-term growth", said Marjorie Qualey, vice president of client reporting and online trading and research for Schwab Institutional, a provider of custodial, operational and trading support for more than 5,000 independent investment advisors.

Said Neal Ringquist, president and chief operating officer of Advisor Software, "Schwab Institutional's selection of ASI Portfolio Rebalancing Solution represents a growing trend. More and more forward-thinking organizations are realizing a competitive advantage by offering tools that help advisors work smarter, make better trading decisions, and prove their dedication to serving clients. To that end, Advisor Software expects a long partnership with Schwab Institutional, providing solutions for ensuring advisor satisfaction."

More About ASI Portfolio Rebalancing Solution

ASI Portfolio Rebalancing Solution, licensed by financial services organizations, allows advisors to rebalance more than 100 accounts simultaneously. The solution empowers financial services firms and their advisors to quickly and easily rebalance client portfolios to an asset allocation or model portfolio target. Key features of the application include:

- **Locking Capabilities** allow advisors to exclude securities from rebalancing.
- **Multiple Account Rebalancing** enables the concurrent rebalancing of multiple client accounts to the same model portfolio and the ability to generate the corresponding master trade list.
- **Household Rebalancing** allows advisors to rebalance one or more accounts from the same household to an asset allocation or model portfolio target.
- **Style and Sector Analysis** provides advisors with a single portfolio view of all products within a household or single account.
- **Wide Investment Product Coverage** allows advisors to rebalance accounts with multiple product types including mutual funds, stocks, bonds and exchange traded funds in a single application.
- **Advisor Customization** allows advisors to configure the application to reflect an advisor's existing practice by creating and saving asset allocation targets and model portfolios. Advisors also have the option to set custom constraints and generate proposals.
- **Integration Capabilities** allow integration with existing portfolio management systems.

About Advisor Software, Inc.

Advisor Software, Inc. is a leading provider of wealth management solutions for the advice market. The company is an industry pioneer, having introduced the first stand-alone enterprise rebalancing solution. In addition, Advisor Software has pioneered the first complete wealth management platform that combines institutional-caliber analytics and a unique, balance sheet approach to financial planning. Advisor Software's applications are designed for a wide range of asset management firms, 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. For more information, visit www.advisorsoftware.com or call (925) 299-7782.

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