

FOR IMMEDIATE RELEASE

Capital Analysts Incorporated Implements ASI Client Acquisition Solution[®] for More Consistent, Insightful Advice Delivery

Leading Portfolio and Proposal Tool Supports Independent Broker/Dealer's Risk and Asset Allocation Models; Innovative Asset Management Programs

Lafayette, Calif. -- March 31, 2008 -- Advisor Software, Inc., a leading provider of wealth management solutions for the advice market, today announced that Capital Analysts Incorporated, a Cincinnati, Ohio unit of Western & Southern Financial Group with \$8.1 billion in assets under management, has implemented ASI Client Acquisition Solution[®]. In doing so, the independent broker/dealer will ensure the delivery of more consistent, insightful advice.

ASI Client Acquisition Solution is an institutional-caliber portfolio construction and proposal generation solution. The flexible web-based application provides support for a wide range of investment products and can scale across the organization, supporting multiple advisors and accounts.

In selecting ASI Client Acquisition Solution, Capital Analysts evaluated applications from a number of leading firms. The factors that led Capital Analysts to implement ASI Client Acquisition Solution were that the application could be configured to meet the individual preferences of advisors, offered support for a wide-range of pre-set asset allocation models and enabled the creation of highly personalized investment proposals. In addition, Capital Analysts could customize the solution to integrate proprietary risk questionnaires and profiles.

Initial roll-out of the product includes support for Capital Analysts Asset Management Services (CAAMS). These services feature seven management account programs, offering multiple model portfolios that include fee-based wrap programs, separately managed accounts, stocks and exchange traded funds (ETFs).

"ASI Client Acquisition Solution will further Capital Analysts' commitment of delivering more personalized, client-centered advisory services," said Stephen T. Mayhew, CFA, SVP and chief investment officer for Capital Analysts. "The solution is a good fit for our organization because it provides the high level of configurability we need to support our uniquely managed products, consider our own risk assessment process and help advisors satisfy the needs of their diverse client-base."

"We are pleased that Capital Analysts selected ASI Client Acquisition Solution, recognizing it as the most comprehensive, flexible application of its kind," said Neal Ringquist, president and chief operating officer of Advisor Software. "This decision reinforces Advisor Software's strong track record of enabling financial institutions to deliver institutional-quality advisory services to the retail investor. To this end, we look forward to a long relationship with Capital Analysts."

More About ASI Client Acquisition Solution®

ASI Client Acquisition Solution is an integrated platform that enables advisors to review an investor's current portfolio holdings, conduct a risk assessment, develop an asset allocation strategy, select securities, create model portfolios and generate a comprehensive investment plan in 15 minutes or less. The solution uniquely leverages institutional-caliber analytics including asset allocation analysis, style and industry sector exposure analysis, security overlap analysis, efficient frontier and Monte Carlo simulation. Advisors can better serve existing clients and convert more prospects into clients by demonstrating the benefits of selected investment products and diversification strategies. Key features of the application include:

- **Configurable workflows** that allow financial institutions to setup their own custom asset allocation models, model portfolios and investment universes.
- **Comprehensive Investment Proposals** that leverage advanced portfolio analytics and an investment policy statement, and can be configured to reflect the advisory firm's brand and promote its services to the client.
- **Wide Investment Product Coverage** to support a range of security types including mutual funds, stocks, bonds, exchange traded funds, separately managed accounts and variable annuity sub-accounts.
- **Integration Capabilities** for full-integration with user management and authentication systems, portfolio management systems and trading platforms.

More About CAAMS

Capital Analysts Asset Management Services (CAAMS) is an innovative suite of asset management programs which include:

- **CAAMS and CAAMS Plus** -- open architecture programs that allow advisors a wide variety of investment choices as a fee-based wrap program.
- **CAAMS Select** -- a separate account program that features access to more than a dozen high quality institutional money managers.
- **CAAMS Complete** -- a combination of active and passive approaches to a diversified asset allocation model that is cost-effective and tax efficient.
- **CAAMS Stock** -- portfolios that are diversified by sector, industry group, capitalization and style.
- **CAAMS Exchange Traded Funds** -- portfolios that provide an alternative to mutual funds by using ETFs representing multiple asset classes and styles.
- **CAAMS Unified Management Account** -- a "best of breed" separately managed account offering.

About Advisor Software, Inc.

Advisor Software, Inc. is a leading provider of wealth management solutions for the advice market. The company has pioneered the first enterprise rebalancing solution and a unique, goal-directed financial planning platform that combines institutional-caliber analytics and a 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.

About Capital Analysts Incorporated

Capital Analysts Incorporated (CAI) was one of the original financial planning broker/dealers, pioneering concepts like diversification and asset allocation that are now industry standards. CAI was the first broker/dealer to provide unbiased proprietary mutual fund research and one of the first to offer "open architecture" fee-based asset management programs. The firm takes this history of innovation into the future with a visionary program that supports the independent advisor in growing a successful wealth management services practice. For more information about CAI, visit www.capitalanalysts.com or call (513) 361-8700.

Contact:

Andrea Corry
Advisor Software, Inc.
(925) 444-1306
acorry@advisorsoftware.com

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