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**Advisor Software Awarded Patent for  
Balance Sheet Solution**

***Innovation Enables Straight-through Process to Connect Financial Plan with Investment Advice***

**Lafayette, Calif. -- June 7, 2010** -- Advisor Software, Inc., a leading provider of wealth management solutions for the advisor market, today announced that the United States Patent and Trademark Office has awarded the company a patent for a unique process, called the Balance Sheet Solution, used to summarize a lifetime of claims and resources in a simple balance sheet format.

This patent expands protection for the company's software, building on Patent No. 7,516,095, which protects ASI Wealth Manager's® method for determining a multi-year investment strategy based on financial planning inputs, including tiered household goals, human capital, investment accounts and real estate holdings.

The newly issued U.S. Patent Applic. No. 11/627,814, entitled "Simulation of Portfolios and Risk Budget Analysis" describes a workstation-based method of summarizing tiered personal goals and resources, taking into account uncertain economic environments over future decades. The balance sheet format claimed in the patent indicates expected resources available to meet tiered personal goals and wealth accumulation (or shortfall) over a lifetime.

"The advantage of this innovation is that it allows advisors to generate investment recommendations while considering comprehensive household information in a fraction of the time it would normally take," says Advisor Software's Chairman and CEO Andrew Rudd. "Using this straight-through financial planning and investment management process allows advisors to adopt an asset-liability management framework for helping investors create a more solid investment plan."

The balance sheet format is particularly useful in making realistic spending plans. This unique methodology is incorporated in ASI's Wealth Manager, a goal-based investment management system for advisors, which is also used to power goalgami ([www.goalgami.com](http://www.goalgami.com)), a free, interactive Web-based software solution that enables individuals and families to quickly assess their financial health.



goalgami is the first goal-oriented personal finance tool designed to empower individuals. It uses a household balance sheet approach to help individuals manage their finances and make smarter decisions. The household balance sheet gathers an individual's income, assets, debts and goals and leverages a sophisticated analytic engine for present value analysis.

“As a feature of goalgami, the balance sheet provides a customizable snapshot of an investor's resources and claims. This real-time picture helps individuals track their investment goals and see how a variety of circumstances can impact their financial security,” Mr. Rudd said. “Our patent for the Balance Sheet Solution reflects our commitment to truly innovative solutions that deliver a uniquely goal-based approach to wealth management.”

For more information, or to speak with Andrew Rudd, please contact Carol Graumann at 973-732-3521 or [carol@jcprinc.com](mailto:carol@jcprinc.com).

**About Advisor Software, Inc.**

Advisor Software, Inc. is a leading provider of wealth management solutions for the advisor 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](http://www.advisorsoftware.com) or call 925-299-7782.

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