

FOR IMMEDIATE RELEASE

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**ADVISOR SOFTWARE AWARDED FOURTH PATENT FOR
ASI WEALTH MANAGER®**

Innovation Creates Goal-Driven, Multi-Year Investment Strategies Based on Household Data

LAFAYETTE, CALIF. – May 25, 2011 – 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 used in its ASI Wealth Manager® platform to determine multi-year investment strategies.

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. 7,925,565, entitled “Stochastic Control System and Method for Multi-Period Consumption,” describes a search algorithm which creates investment strategies that take into account uncertain economic environments over future decades and maximizes wealth against tiered personal goals. This unique methodology is incorporated in ASI Wealth Manager, a goal-based investment management system for advisors, which is also used to power Advisor Software’s goal-driven investing solutions, such as goalgami, goalgamiPro and the ASI Goal-based Proposal Solution.

“At Advisor Software, we believe traditional approaches to financial planning leave advisors without the tools they need to connect investments with client’s specific financial goals. Our patented ASI Wealth Manager software bridges the gap between financial planning and investment management by replacing the generic investment benchmark with the household balance sheet,” said ASI chairman and CEO Andrew Rudd. “This latest patent reinforces our commitment to innovative, goal-based investment management aimed at helping advisors build unique and dynamic investment portfolios for each of their clients.”

For more information, please contact Dana Taormina at dana@jcprinc.com or 973-850-7305.

About Advisor Software, Inc.

Advisor Software, Inc. is a leading provider of advice 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 solutions 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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