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ADVISOR SOFTWARE INC. LAUNCHES GOAL-BASED PROPOSAL SOLUTION FOR ENTERPRISE CLIENTS

Goal-Based Software Delivers Financial Planning Advice Driven by Household Balance Sheet

WALNUT CREEK, Calif. – November 30, 2011 – Advisor Software, Inc., a leading provider of wealth management solutions for the advisor market, today announced the release of the ASI Goal-Based Proposal Solution for enterprise clients. The software allows investment professionals to integrate financial planning and investment management to create personalized advice for clients using customized household balance sheets that showcase every client’s true capacity for risk.

“Our driving focus is helping advisors guide investors to understand the connection between their financial goals and their investment plan,” said Neal Ringquist, President and COO of ASI. “The ASI Goal-Based Proposal Solution allows us to take that approach to the next level and distribute it to enterprise clients who recognize the value of our goal-driven investing system and want to deliver better solutions for their investment professionals and clients.”

The ASI Goal-Based Proposal Solution applies the asset-liability matching concepts of the pension industries’ liability driven investing methodology to the retail investment problem. The software allows advisors to determine their clients’ capacity for risk by analyzing their entire household picture, not just administering a risk questionnaire. In addition, the goal-based software gives investment professionals the opportunity to measure their success in terms of progress against goals, putting the client’s unique needs at the center of all financial plans.

“The ASI Goal-Based Proposal Solution is an integrated advice delivery system, allowing financial professionals to gauge the effectiveness of their programs and adjust their outlook based on a client’s up-to-date financial information,” Mr. Ringquist said. “The solution allows advisors to deliver not just superior results, but to work towards pre-determined goals that meet their clients’ needs.”

ASI has begun working with several enterprise clients to roll out the software, including Russell Investments, a global financial services firm serving institutional investors, financial advisors and individuals in more than 40 countries, as well as EverBank, a privately held bank holding company providing banking, investing and lending products nationwide. Both institutions have used the ASI Goal-Based Proposal Solution to help their investment professionals deliver greater value and customized advice to their clients.

“The ASI Goal-Based Proposal Solution provides a tool to advisors to help individual clients think about investing using the same liability-driven approach that pension plans have used for years. It gives them a measure of success that is determined by the individual’s circumstances

with a custom financial plan that directly assesses their capacity for risk,” said Phill Rogerson, Managing Director of Consulting and Product Services for Russell’s advisor-sold business. “We believe in the benefits of goal-driven investing and this solution is an instrumental way to help advisors tailor investment solutions to meet each individual’s goals.”

“The goal-based solution has helped us build a strong foundation for our wealth management group, providing a platform for a conversation with clients that can help them meet their goals,” said Frank Trotter, President of EverBank Direct. “We are able to offer custom recommendations that align with our client’s most pressing concerns, offering distinct solutions to address their individual needs.”

For more information about ASI, please contact Dana Taormina at 973-850-7305 or dtaormina@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 or call (925) 444-1334.

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