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CONTACT: Dana Taormina
JCPR
973-850-7305
dtaormina@jcprinc.com

ADVISOR SOFTWARE LAUNCHES GOALGAMIPRO™

goalgamiPro's Unique One-Page Household Balance Sheet Report Enhances Advisor-Client Communication

WALNUT CREEK, CALIF. – October 11, 2011 – Advisor Software, Inc., a leading provider of wealth management solutions for the advisor market, announced the launch of goalgamiPro, a unique goal-driven financial planning tool. goalgamiPro is a web-based platform that enables advisors to create and maintain multiple household balance sheets for clients, providing an effective and efficient way to help clients prioritize and determine the feasibility and affordability of their financial goals.

“To help improve their investment planning process, advisors are seeking a solution that helps them go beyond the risk tolerance questionnaire and suitable investments and towards gaining a more in-depth understanding of their clients’ financial goals, resources and commitments quickly when time does not allow for completing a full financial planning analysis,” said Neal Ringquist, President and Chief Operating Officer of Advisor Software. “The household balance sheet delivered by goalgamiPro is an optimal tool for this quick assessment of goal plan affordability.”

goalgamiPro leverages ASI Wealth Manager®, a patented, goal-driven investment management solution. For additional planning flexibility, goalgamiPro allows the advisor to express a client’s goals in multiple priority classes – Necessary, Target and Aspirational. The key output of goalgamiPro is a PDF report of the household balance sheet diagnostic, indicating whether a client can afford to fund his or her financial goal plan. Highlights of the report include:

- **Funding Ratio**, or percentage of each goal priority class that can be funded by existing resources; and
- **Margin of Safety**, or the percentage loss that a household’s resources can absorb while still maintaining full funding of each goal priority class.

Jim Anderson, Chief System Officer with CLS Investments, LLC says, “The goalgamiPro report provides a simple, yet complete picture of the client’s household assets and liabilities. We believe our advisors will find it a productive tool to support their discussions with clients regarding the priority level of goals.”

“Making a goal plan affordable doesn’t have to mean giving up funding a child’s college education to plan for retirement—household goals can coexist at different funding levels,” said Mr. Ringquist. “goalgamiPro allows advisors to have a discussion with clients regarding priority levels within goals and quickly perform this critical balance-sheet analysis without having to invest hours of time preparing a full financial plan.”

For more information, please contact Dana Taormina at dtaormina@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 925.444.1334.

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