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AdviceAmerica Introduces AdvisorVision 7 Comprehensive Financial Planning System

Flagship Product Includes Automated Plan Optimization Tools to Reduce Planning Time, Fully Integrated with New Outlook-based CRM Tool

Fremont, CA – April 28, 2009 – AdviceAmerica, a leading provider of financial advisor software solutions, announced a new generation of the flagship financial planning product line, AdvisorVision™ 7. The new release, targeted at both independent advisors as well as institutional firms, includes a new Advice Engine that automatically determines optimal plans and significantly shortens the time advisors spend in the planning process compared to other comprehensive planning applications. AdvisorVision 7 is tightly integrated and shares data with AdviceAmerica's new client relationship management (CRM) tool, ClientVision, announced earlier this year.

"The new Advice Engine brings significant efficiency to financial planners at a time when cost cutting and efficiency are at a premium", said Purna Pareek, founder and CEO of AdviceAmerica. "Providing optimal, multi-goal recommendations is often a tedious trial and error process for clients and advisors. Using advisor-defined constraints, the Automated Advice Engine allows advisors to provide sophisticated, client-specific solutions upon an automated system that fills in the gaps, as well as allowing the advisor to develop and propose customized alternative scenarios."

AdvisorVision 7 meets the growing need for an integrated set of advisor applications that share data and a common framework designed to increase advisor efficiency and productivity, while delivering more sophisticated services to clients. The combination of AdvisorVision 7 and ClientVision now integrates financial planning, portfolio construction and client relationship management in one seamless platform.

The key new features of AdvisorVision 7 include:

- AdviceCenter Modeling Tools – The AdviceCenter is an intuitive and flexible modeling tool to construct planning scenarios that may include product solutions such as annuities or reverse mortgages. Advisors can create compelling relevant proposals to illustrate the value of products in the plan.
- Automatic Resource Allocator – Automatically allocates assets, income streams and savings to goals based on priorities and industry best practices in the most efficient fashion, saving advisors time in planning and tedious scenario comparisons.
- Business Management Reports – Provides increased insight into the advisor's business through management-level reports, including demographic analysis of client book, portfolio rebalancing, revenue opportunities and application usage.
- Investment Policy Statement – Automatically generates investment policy statements based on client objectives and advisor recommendations.
- Improved Model Management and Portfolio Construction Tools – Gives advisors the flexibility to define unlimited number of asset allocation models and to associate mutual funds, stocks or ETFs for faster investment proposal generation.
- New High Security Datacenter – As a hosted application, advisors never need to spend time installing, managing or maintaining applications and servers. The enterprise-class SAS 70 certified datacenter ensures high levels of security, automatic backups, failover, and anytime/anywhere access. The new

datacenter also boosts the scalability and performance of the application by deploying state of the art servers required for the computation-intensive Advice Engine.

Fully-integrated with ClientVision CRM Solution

AdvisorVision 7 delivers on the vision of an integrated suite of applications that encompass financial planning, portfolio analytics and CRM – all sharing the same data repository so the client data flows from one application to another transparently, thereby completely eliminating the error prone data entry process. Advisors can now seamlessly manage all the data to run a comprehensive financial plan or a complex portfolio without ever leaving Outlook. The ease of use, not having to learn another application, and always having all the information at a glance in one application is critical for advisor and team productivity.

"Until today, financial advisors had to cope with separate CRM and financial planning tools from different providers that barely exchanged accounts and position information. With a completely integrated application suite, advisors become more efficient, with more reliable results," said Purna Pareek. "Financial planners build value in their practice by offering detailed advice and financial strategies to help clients reach their goals. By automating this process, we are making advisors much more efficient and reducing the time and complexity involved in generating a high-value financial plan."

AdvisorVision 7.0 comprehensive planning edition is available immediately, and is priced at $1,495 for a single copy annual subscription. Existing AdvisorVision users can upgrade to AdvisorVision 7 at no charge. ClientVision is available as an optional component to AdvisorVision users for $199 annually. Corporate licenses and volume discounts are also available.

About AdviceAmerica

AdviceAmerica is the leading provider of integrated advisor solutions to financial institutions and independent advisors that include financial planning, asset allocation and client relationship management solutions. AdviceAmerica products allow advisors to improve productivity, deliver better services to clients, and increase advisor revenue and client retention. AdviceAmerica solutions are comprehensive, yet easy to use. Built on a modular web-based platform, AdviceAmerica solutions offer lower total cost of ownership and adapt easily to a wide range of practice models and advisor needs. AdviceAmerica is a Microsoft Gold Certified Partner. http://www.adviceamerica.com.