

## **Advisor Software Awarded Patent for Goal-Based Advice Solution**

*Innovation enables straight-through process to connect financial plan with  
investment advice*

**Lafayette, Calif. – April 14, 2009** -- 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 granted the company a patent for a unique process used in its ASI Wealth Manager® application that determines a multi-year investment strategy based on financial planning inputs, such as tiered household goals, human capital, investment accounts and real estate holdings.

The newly issued U.S. Patent No. 12/038,712, titled “Stochastic Control System and Method for Multi Period Consumption” describes a workstation-based search algorithm which formulates investment strategies that take into account uncertain economic environments over future decades and maximizes against tiered personal goals. This unique methodology is incorporated in ASI Wealth Manager, a goal-based investment management system encompassing a comprehensive view of the household balance sheet.

“The advantage of this innovation is that it allows advisors to generate investment recommendations 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.”

### **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.

### **Contact:**

Advisor Software, Inc.  
Neal Ringquist  
(925) 444-1330  
[nringquist@advisorsoftware.com](mailto:nringquist@advisorsoftware.com)