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## **Advisor Software Launches goalgami<sup>SM</sup> Personal Finance Tool**

*New Online Tool Helps People Manage Financial Goals and Make Smarter Decisions*

**Lafayette, CA – March 15, 2010** -- Advisor Software, Inc., a leading provider of advice solutions for the advisor market, today announced the launch of goalgami, an online personal finance tool that helps people take control of their finances in a new way.

“goalgami is the first, goal-oriented personal finance tool designed to empower individuals,” said Advisor Software’s CEO Andrew Rudd. “By giving people a full view of their household Balance Sheet, goalgami helps them set measurable financial goals and understand how to make trade-offs in order to form a sustainable financial plan.”

Available now at [www.goalgami.com](http://www.goalgami.com), goalgami is a free, interactive Web-based software solution that enables individuals and families to quickly assess their financial health. Investors can prioritize their goals along a timeline and use goalgami to stay on track to meet them. goalgami is unique because it uses a household Balance Sheet approach to helping people manage their finances, empowering them to make smarter decisions and better prioritize their spending and savings. The household Balance Sheet gathers an individual’s income, assets, debts and goals and leverages a sophisticated analytic engine for present value analysis.

Powered by Advisor Software’s patented ASI Wealth Manager<sup>®</sup> solution for financial advisors, goalgami offers individual investors the ability to:

- Easily identify and organize their financial resources and goals;
- Quickly generate a personal household Balance Sheet;
- Measure their financial resources vs. their goals over a life span;
- Calculate to what extent their resources can fund their goals;
- Explore how different life scenarios will affect their balance sheet;
- Create their own financial plan and send it directly to their financial advisor;
- Get instant feedback that informs their financial decisions and priorities.

goalgami goes beyond other programs to answer a fundamental question for investors: Can you really achieve your lifelong goals? And if not, what steps can you take right now to get yourself back on track? The key goalgami features that help users do this include:

- ***Progress Report.*** Users receive instant feedback on whether or not they can afford their life's goals and expenses.
- ***Affordability Meter.*** Gives an indication of whether an investor can achieve the expenses and goals, including retirement, that they enter as part of their financial plan.
- ***The Balance Sheet.*** Provides a simple, customizable snap-shot of an investor's Resources (income and assets) versus their Claims (debts, bills and expenses).

“Advisor Software is committed to developing innovative solutions that help investors achieve concrete financial goals,” Mr. Rudd continued. “With goalgami, we’re bringing our new goal-based advice approach to individuals at an important time, as many households reassess their financial needs and resources.”

For more information, or to speak with Andrew Rudd, please contact Kate Rambo at 973.732.3521 or [kate@jcprinc.com](mailto:kate@jcprinc.com).

#### **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](http://www.advisorsoftware.com) or call 925.299.7782.