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Adhesion Wealth Advisor Solutions Innovates the Design and Deployment of Unified Managed Accounts, Adds Strategists

Charlotte, NC, March 31, 2010—Adhesion Wealth Advisor Solutions Inc., a leader in next generation Unified Managed Accounts (UMAs) for independent registered investment advisors (RIAs), announces an expanded array of UMA delivery and support options.

“We are seeing a tectonic shift in how advisors approach all aspects of investment management,” says Michael Stier, president & CEO of Adhesion. “As investors demand greater transparency and flexibility in response to volatile market forces and previously unforeseen risks, advisors are increasingly turning to model-based UMAs as the investment vehicle of choice. Adhesion’s new, expanded array of design and delivery options simplifies the incorporation of UMAs into an advisor’s practice.”

Adhesion’s Unified Managed Account platform offers an innovative approach to portfolio construction that helps advisors and wealth managers better manage risk, gain greater access to external investment management expertise, facilitate tactical adjustments to asset allocation, and enable better after-tax returns.

“The notion of outsourcing the non-value added functions of portfolio management via UMAs is gaining a tremendous amount of traction as advisors look to compress costs and introduce specialization,” adds Barrett Ayers, Adhesion’s EVP and managing director of Overlay Portfolio Management. “With our new modular approach to portfolio construction, advisors retain control over the areas they see as value-added while achieving a higher level of efficiency, lower cost, and more controlled risk exposure than the do-it-yourself advisor.”

Modular Approach to UMA Program Design

Adhesion’s current clients design their own UMA programs, which are then implemented by Adhesion. Now, advisors can choose from three different levels of design and support:

Custom Option

Advisors who are fully comfortable with all aspects of asset allocation, manager research and due diligence can continue designing their own custom strategies, utilizing leading money managers and advisor proprietary portfolios, as well as ETFs and mutual funds.

In response to strong market demand Adhesion has added two new alternatives for advisors looking for expert assistance in building a UMA-based investment program:

Open Framework Option

“Think of this as an open-architecture ‘accelerator’ for portfolio construction,” says Ayers. “With the Open Framework option the advisor gets a head start by tapping into an array of pre-defined,

adaptable asset allocation frameworks, including 'core-alpha-alternative' and the traditional 'style-box' models. Then they inject their proprietary insight through the selection of specific managers and vehicles with which to implement the portfolio components.”

Strategist Turnkey Option

Advisors who prefer to rely more on external expertise now have access to ready-to-use, fully researched and documented investment programs from professional third-party strategists. These strategists have engineered robust multi-manager investment programs for delivery through Adhesion's UMA platform. Advisors leverage the strategists' expertise in asset allocation, manager research and due diligence.

Along with the Strategist Turnkey Option, Adhesion announces the addition of the following Strategists to its UMA platform:

Capital Market Consultants, LLC – WealthMark UMA Portfolios

CMC is an institutional investment consultant exclusively serving financial intermediaries with a combined 30 years of open-architecture program development and management experience.

WealthMark UMA Portfolios were constructed specifically for the Adhesion Unified Managed Account platform. Comprised of institutional-quality managers, the five WealthMark diversified portfolios accommodate the full spectrum of investment objectives, risk tolerances and account sizes. The WealthMark UMA Portfolios offer advisors a comprehensive, fully packaged investment program for their clients.

Advisors can learn more about CMC and the WealthMark UMA Portfolios by attending the WealthMark webinar scheduled for April 8, 2010.

Fund Evaluation Group, LLC – FEG/Managed Portfolios

FEG is an independent, full service advisory firm that has provided investment services to institutional clients for over 20 years. FEG clients include endowments, foundations, retirement plans, wealth managers and investment advisors.

FEG/Managed Portfolios are managed by a team of four experienced investment professionals and supported by a large research group that is organized to cover global markets including traditional and alternative managers. The portfolios are constructed using the philosophy applied to large institutional clients: a risk management approach that seeks to add value through both asset allocation and manager selection. Portfolios include both ETFs and mutual funds. Asset allocation is dynamic, based on long-term valuation analysis.

Advisors can learn more about FEG and the FEG/Managed Portfolios by attending the webinar scheduled for April 15, 2010.

About Adhesion Wealth Advisor Solutions

Founded in 1999, with over \$10 billion in assets under administration, Adhesion delivers wealth advisor solutions to independent financial advisors and wealth managers. Its WealthADV platform is a comprehensive managed investing service, providing complete Unified Managed Account, client reporting and back office solutions to RIAs to help them stay at the forefront of the market and grow successful practices. For further information, visit Adhesion at www.adhesionWealth.com or contact sales@adhesionwealth.com.

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