

Capital Market Consultants Teams with Adhesion Technologies to add Packaged Multi-Manager Model Strategies to WealthADV Unified Managed Accounts

October 10, 2007 – Charlotte, NC and Milwaukee, WI – Unified Managed Accounts (UMAs) are revolutionizing the service delivery landscape for fee-based financial advisors. For independent advisors, however, the selection of good managers, with strategies that work effectively together, has been a daunting challenge. To address this challenge, Adhesion Technologies and Capital Market Consultants (CMC) announced today that they have teamed up to offer pre-packaged multi-manager model strategies delivered through Adhesion's WealthADV Unified Managed Accounts platform.

WealthADV is a comprehensive *Managed Investing* service, delivering the complete client reporting, back office and unified managed account (UMA) solution that advisors need for growing successful practices. CMC offers independent Open Architecture Investment Management (OAIM) research, content and consulting to financial intermediaries.

"One of the most necessary, time consuming and expensive aspects of an investment advisory business is ensuring access to the high quality manager choices necessary for making prudent portfolio decisions as part of their fiduciary duty", states Barrett Ayers, Director of Product and Portfolio Management at Adhesion. "The pre-packaged CMC model strategies allow advisors to leverage the investment manager research and portfolio construction expertise of CMC, and their client communication materials, in a cost effective manner. With the CMC-WealthADV series of strategies, advisors will find a well researched and documented solution suitable for most client objectives and risk profiles."

"Overlay Portfolio Management (OPM) is the core process behind UMAs. OPM services greatly increase the adviser's capacity to provide personalized investment management services, particularly to high-net-worth clients requiring sophisticated investment solutions", remarks Barry Mendelson, CIMA, managing partner of Capital Market Consultants. "With the WealthADV UMA offering advisors get a lot more than an account with great investment options. Their clients receive active tax management, accommodation of client-specific customizations and compliance mandates, continuous account monitoring, trading, account reconciliation, billing, and performance reporting.."

Michael Stier, Adhesion's president & CEO comments, "For the independent advisor I strongly believe that the combination of the WealthADV platform and CMC's multi-manager strategies creates a superior, comprehensive model-based investment management solution. The advisor receives extensive manager due diligence, distinctive client reporting, and professional portfolio management. I am very enthusiastic about our partnership with Capital Market Consultants and the resultant value WealthADV will provide advisors and their clients."

About Capital Market Consultants, LLC

CMC is the leader in developing custom Open Architecture Investment Management business solutions for financial service organizations and intermediaries. With nearly fifty years of OAIM experience, 100 combined years of high net worth investor experience and a unique set of team skills and resources CMC is the partner of choice for firms and advisors striving to grow their investment OAIM business improve their services and differentiate themselves in an increasingly competitive marketplace.

WealthADV is Managed Investing

WealthADV delivers a unified managed account and unified performance reporting service to independent RIAs. With WealthADV Unified Performance Reporting clients receive distinctive, consultant style reports, optimized for managed accounts. Unified household reporting can roll together a client's full set of assets: WealthADV UMAs, other managed or advised accounts, partnership interests and other assets, as well as accounts advised away. WealthADV is a fully outsourced, managed service for high-end client reporting which includes the needed back office administration such as multi-custodian data consolidation and reconciliation, portfolio accounting, performance measurement, and billing, without the requirement for you to administer technology or hire operations staff. Distinguishing features of WealthADV include: 'Always Available' reporting on current data; true daily, time-weighted performance calculations; and flexible benchmarking methods (blended, fixed, policy or custom) with a vast library of available indices.

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