

**FOR IMMEDIATE RELEASE**

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**EMERALD ASSET ADVISORS ANNOUNCES THE AVAILABILITY OF THEIR ‘ALTERNATIVE’ ALLOCATION STRATEGIES ON ADHESION TECHNOLOGIES’ WEALTHADV PLATFORM**

**The “Emerald Allocation Strategies” offer a low-correlation approach, using mutual funds and ETFs, in UMA package**

(Weston, FL and Charlotte, NC) – October 23, 2007 – Emerald Asset Advisors, an investment strategy firm, has made three of its previously proprietary investment portfolios available to independent advisors via Adhesion’s WealthADV platform. Emerald has been recognized as one of the top advisors in the U.S. by Worth Magazine and Wealth Manager Magazine. The firm’s signature strategy, “Hybrid,” was featured on the cover of a recent issue of Registered Rep Magazine. In addition, the strategies and the Emerald portfolio team have been highlighted in Investment News, Financial Planning Magazine, and The Wall Street Transcript.

“Until recently, the Emerald Allocation Strategies (EAS) were only available directly through Emerald Asset Advisors and their primary custodian, Schwab Institutional, and clients of FTJ FundChoice”, remarks Rich Conley, SVP of Sales at Adhesion. “Now, with WealthADV, advisors gain access to Emerald’s strategies regardless of which custodian they use (e.g., Schwab Institutional, TD Ameritrade Institutional, Pershing, or Fidelity), and without the account minimum restrictions.”

Allan Budelman, a partner at Emerald noted, “We are a WealthADV client for our own internal portfolio management operations and client reporting. The Adhesion folks are very professional and have built a terrific managed service platform. We are excited to now expand our relationship with the distribution of EAS through that platform to other advisors.”

The Emerald Allocation Strategies (EAS) aim to reduce the impact of market forces on results by seeking performance that is largely independent from market conditions. By doing so, they offer independent advisors a complement to traditional strategies. “Investment advisors have traditionally struggled to identify alternative investments that they and their clients are comfortable with,” said Rob Isbitts, Emerald’s Chief Investment Officer. “For wealthier clients, Hedge Funds have met this need in some cases. However, recent events have highlighted the many risks they can pose. Limited liquidity, high fees, lack of transparency and limited regulation all have contributed to hedge funds’ blemished image. And, since investors with a net worth below \$1mm typically cannot invest in hedge funds, this group has been looking for alternatives to traditional strategies for some time. We have used EAS for our firm’s clients for years and now we invite other independent advisors with clients at all levels of wealth to access them.” Isbitts is the author of “Wall Street’s Bull and How to Bear It” (2006, Isle Press, with Ian Lohr).

There are three Emerald Allocation Strategies, with performance composites maintained in accordance with CFA Institute’s Global Investment Performance Standards (GIPS).

**HYBRID STRATEGY:** Hybrid investing is similar to the multi-manager approach used by absolute return hedge fund-of-funds. The difference is that we use mutual funds and other traditional, highly-liquid investment vehicles that employ hedge fund-like strategies. By doing this, we expect to deliver to the investor a competitive risk-reward profile as compared to absolute return hedge funds as well as traditional fixed income strategies.

**CONCENTRATED EQUITY STRATEGY:** a diversified mix of equity fund styles that each pursue long-term growth of capital using a very limited number of holdings (typically 30 or less). The strategy attempts to lower volatility by buying short-index securities as a hedge in perceived periods of high market risk.

**GLOBAL CYCLE STRATEGY:** securities that seek to capitalize on long-term trends identified by Emerald's research team. This strategy often involves investing in areas of the markets that exhibit high short-term volatility. While the themes are expected to play out a long period, short-index securities are used as a hedge in perceived periods of high market risk.

Matthew J. MacEachern, an EAS Portfolio Manager, noted that “EAS employs a set of strategies that have low correlation to the broad stock and bond markets, while offering varying degrees of expected volatility. This allows the advisor to allocate among the strategies in line with each client’s risk tolerance.”

**Emerald Asset Advisors** is a Registered Investment Advisor founded in 1998. Asset under management were approximately \$270mm as of July 31, 2007. The firm has have achieved a reputation for bypassing conventional wisdom and designing insightful portfolio strategies that offer a refreshing approach to protection, growth and diversification of assets. Emerald’s website, [www.emeraldassetadvisors.com](http://www.emeraldassetadvisors.com) discusses the firm, its people and the Emerald Allocation Strategies (EAS) in more detail.

**WealthADV is a comprehensive Managed Investing service**, delivering the complete client reporting, back office and UMA solutions that RIAs need for growing successful practices.

With **WealthADV Unified Household 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 the RIA to administer technology or hire operations staff.

With **WealthADV Unified Managed Accounts (UMAs)** RIAs have the flexibility to construct custom composite allocations from an open-architecture library of investment strategies from nationally-acclaimed and boutique money managers, and their own proprietary models. Professional Overlay Portfolio Management (OPM) is the core process that drives WealthADV UMAs. It requires coordinating the investment recommendations among multiple managers and any client restrictions or mandates, generating and blocking trade orders, trade execution with various custodians, and active management of tax impacting events. As such, effective OPM requires leading edge technology and experienced portfolio managers, resources few independent advisors can muster. With WealthADV UMAs, professional overlay portfolio management and trading is an integral part of the service, removing another scalability hurdle for RIA firms.

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