



NATIONAL ADVISORS TRUST AND ADHESION WEALTH ADVISOR SOLUTIONS PARTNER TO PROVIDE SHAREHOLDERS WITH LEADING UNIFIED MANAGED ACCOUNT AND CLIENT REPORTING SOLUTION

April 15, 2009 - Overland Park, KS and Charlotte, NC – Today National Advisors Trust Company FSB and Adhesion Wealth Advisor Solutions announce a partnership which results in added investment product and operating solutions for National Advisors Trust's shareholder firms. The components of this partnership include:

- Adhesion as preferred vendor for Unified Managed Accounts (UMAs) and Reporting/ Back Office Services.
- National Advisors Trust as custodian option for Adhesion's WealthADV UMA platform.

Expand – Innovate – Distinguish

Leading RIA firms have aggressive plans to **expand** their businesses. Adhesion's WealthADV platform offers National Advisors Trust shareholder firms a scalable operating platform that supports and facilitates the most aggressive plans. With WealthADV:

- Investment management, client reporting and portfolio accounting are no longer hampered by the firm's difficulties with acquiring, developing and maintaining in-house personnel and technology;
- Online reporting and inquiry fully facilitates firms operating with multiple advisors, locations, offices and affiliated firms;

Addressing clients' needs and concerns in today's market requires **innovative** investment solutions that maximize transparency, flexibility and after-tax return opportunities. The WealthADV UMA platform provides National Advisors Trust shareholder firms such a solution, leveraging the advisor's expertise in crafting appropriate asset allocation strategies for their clients with an innovative, lower cost, multi-custodian platform for implementing those strategies.

Given the increasingly competitive environment for independent wealth managers, the ability for firms to **distinguish** themselves from the pack is paramount. National Advisors Trust shareholder firms have long recognized that the provision of trust services is one such distinguishing capability. With Adhesion's WealthADV, these wealth managers can distinguish themselves with their client through:

- Highly polished, comprehensive reporting that incorporates the entire household portfolio regardless of where investments are held;
- Tax efficient overlay portfolio management, maximizing after-tax returns;
- Lower cost investment products through leveraging National Advisors Trust as custodian for WealthADV UMAs.

National Advisors Trust shareholder firms can learn more about Adhesion's WealthADV at the National Advisors Trust annual shareholders conference held in Santa Barbara, CA during April 22-24.

About National Advisors Trust Company, FSB

National Advisors Trust Company, FSB, a federally-chartered trust company with approximately \$4 billion in assets is the largest independent RIA-owned trust company in the nation. National Advisors Trust was formed in 2001 by 82 of the nation's top financial advisory firms to set a new standard of excellence in trust and custodial services and to facilitate multi-generational client relationships through trust services. The trust company has grown to over 125 financial advisor shareholders, and through the combined strength and size of these firms, National Advisors is able to provide a superior level of trust and custodial services along with advanced investment management systems and investment alternatives. National Advisors Trust is chartered in all 50 states, is regulated by the Office of Thrift Supervision (OTS), and is a FDIC member. National Advisors Trust Company, FSB, is a wholly owned subsidiary of National Advisors Holdings, Inc., a Delaware Corporation. For more information on National Advisors, please visit www.nationaladvisorstrust.com.

About Adhesion Wealth Advisor Solutions

Adhesion has been delivering wealth advisor solutions since 1999. Its WealthADV platform is a comprehensive Managed Investing service, providing the complete unified managed account, client reporting and back office solutions RIAs need to stay at the



forefront of the market and grow successful practices. For more information regarding WealthADV please visit with us at www.WealthADV.com, or contact Rich Conley at rich.conley@wealthadv.com or 888.295.8351 extension 1.

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