

CAPITAL FINANCIAL ADVISORS LLC AND ONCUBIC LLC EMBRACE THE WEALTHADV “MANAGED INVESTING” PLATFORM FOR GREATER BUSINESS SCALABILITY

July 17, 2007 – La Jolla, CA and Charlotte, NC – Fee-Only advisory firms Capital Financial Advisors LLC and Oncubic LLC are announcing enhanced services to their clients and increased scalability for their practices as a result of their partnership with Adhesion Technologies. Adhesion's WealthADV is a comprehensive *Managed Investing* platform providing model-based Unified Managed Accounts with Overlay Portfolio Management and Unified Household Reporting with portfolio accounting services.

Working primarily with clients whose net worth exceeds \$10 million (with many over \$30 million), Capital Financial Advisors provides sophisticated estate planning, asset protection, and tax planning. “I want to compete effectively with Wall Street firms”, says Christopher Van Slyke, Managing Director. “I see our firm becoming the dominant financial planning firm in Southern California. Critical to that goal is an institution-class operations and technology infrastructure with which to service our clients and scale with our practice. Adhesion's WealthADV provides us that platform. Their professional staff handles all of the day-to-day portfolio rebalancing, trading, and data / back-office administration, while we get state of the market client and performance reporting through their web-based technology. Their systems electronically interface with our custodian, TD Ameritrade, for data access and trading, enabling us to spend more time responding to our clients' needs.”

Oncubic LLC provides turnkey institutional investment management services to clients in a similar fashion to Capital Financial Advisors, with low fees and conflict free fiduciary advice, but without the comprehensive wealth management services required by high net worth clients. Likewise, Oncubic needed an efficient and scalable infrastructure to support its growing volume of clients. With the WealthADV *Managed Investing* platform Oncubic is confident that the trading and operational services provided by WealthADV will enable them to meet the increasing demand for its investment services.

WealthADV is *Managed Investing*:

- Distinctive reporting and customized investment management for clients.
- Construct UMAs from an open-architecture library of investment strategies from nationally-acclaimed and boutique managers;
- Professional overlay portfolio management, trading and back-office services wrapped with market-leading technology;
- Custodian independence and enhanced practice economics for investment advisors.

Adhesion Technologies Inc., headquartered in Charlotte, NC, has been delivering leading edge solutions in financial services since 1999. To learn more about *Managed Investing* through WealthADV please visit www.WealthADV.com.

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