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New Research Program Provides Financial Advisors Best-Practice View of Technology

First-of-its-Kind Program to Help Advisors Make Better Business Decisions

DENVER...February 23, 2009...As market volatility continues to add pressure to planners, the Financial Planning Association® (FPA®) and ActiFi Inc. are collaborating to take the guesswork out of technology purchases and important business decisions through a comprehensive software, technology and business best-practice research program.

The research program will provide planners an objective and personal view of how technology can improve client services and increase profits. A series of in-depth reports and analyses will compare and contrast the attributes of various software and technology offerings and determine which package is best for a firm's business operation.

"In many industries, there are 'technology scorecards' that help make choosing the right software easier based on how a company conducts its business," said Ian MacKenzie, chief marketing officer for FPA. "Objective and comprehensive technology analysis doesn't currently exist in the wealth management world; thus, we will fill that void and provide a level of sophistication that frankly is long overdue."

FPA and ActiFi will conduct extensive research in the various software and technology products available to advisory firms. In addition, qualitative surveys and in-person interviews will provide a best-practice view of how technology can interact to improve operations, client service, client acquisition, and ultimately a business's profitability.

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Seven reports are planned over the next two years. They will provide actionable insights on various products, which can be applied immediately to improve a planner's practice. The suite of reports will cover financial planning software, customer relationship management, compliance, report generators, document management, portfolio rebalancing and portfolio management.

"All too often we see financial advisory practices that have made the wrong technology decisions by focusing on the bells and whistles of a software package versus what tools will drive their client experience and improve their business processes," said Spenser Segal, CEO of ActiFi. "Advisors don't have the time to be software experts and thus rely on what's promised in marketing and sales literature. With the FPA, we're going to take a leadership role in helping the industry define best practices and then provide advisory firms the objective information they need to make wise choices."

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Note to Media: Full-time editors and reporters may request the executive summary of the study by sending e-mail to Media@FPAnet.org.

About FPA:

The Financial Planning Association® (FPA®) is the leadership and advocacy organization connecting those who provide, support and benefit from professional financial planning. FPA demonstrates and supports a professional commitment to education and a client-centered financial planning process.

Based in Denver, Colo., FPA has close to 100 chapters throughout the country representing more than 28,500 members involved in all facets of providing financial planning services. Working in alliance with academic leaders, legislative and regulatory bodies, financial services firms and consumer interest organizations, FPA is the community that fosters the value of financial planning and advances the financial planning profession. For more information about FPA, visit www.FPAnet.org or call 800.322.4237.

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About Actifi

ActiFi™ works with financial advisory practices and institutions that serve advisors to alter the economics of delivering world-class advice. By implementing proven people, process, and technology solutions, ActiFi's clients run more effective and profitable businesses with results that scale over time. Ranked by Inc. Magazine as the 29th fastest growing company in the financial services industry, Minneapolis, MN based ActiFi offers a suite of consulting solutions, customized technology tools, and implementation services that ultimately help firms build great businesses. Learn more at www.actifi.com.