PRESS RELEASE

United Planners Selects Finance Logix for Financial Planning Technology Platform

Comprehensive financial planning, client prospecting and client engagement management technology enables growth and productivity

Scottsdale, AZ and Seattle, WA – [**August 17, 2012**]: United Planners, a unique registered investment advisor and full-service independent broker/dealer, and Finance Logix, a premier financial planning services firm, have entered into an agreement and announced that United Planners will offer Finance Logix's innovative and robust financial planning software to their sales force as well as strategically integrate this technology into the United Planners technology platform.

To facilitate growth, United Planners has been dedicating a significant amount of resources to expand their suite of technology offerings. "We have been on a mission to find strategic partners that provide more than just a product or service," said Billy Oliverio, Vice President of United Planners. "We seek partnerships that are passionate about making a difference in our industry to service our clients at the highest level. Finance Logix has displayed a commitment to this entrepreneurial spirit to pioneer new concepts and we are excited about our plans to create exclusive integrations with their firm. In addition to their comprehensive financial planning module, Finance Logix also offers client prospecting and client engagement management tools as an additional layer of value."

Key features of the Finance Logix technology suite that will be a foundational aspect of United Planners' offering are:

- **Comprehensive Financial Planning Modules:** Finance Logix's innovative, dynamic and graphical planning analyses will provide user-friendly reports and analyses for all aspects of the financial planning process, including: retirement planning, retirement income planning, asset allocation, insurance planning, estate planning and college funding. Finance Logix also has the capabilities to conduct and present these planning analyses based on Cash Flow or Goal Orientation.
- **Mobile Applications (Apple and Android):** Finance Logix's mobile application, **Retire Logix,** is an intuitive app that **Money Magazine** has added to its "100 Best Money Moves" that features a Quick Plan tool, referred to as "Plan in 60 Seconds." This mobile capability will enhance United Planners' ability to engage prospects in the retirement planning process and enhance marketing capabilities.
- **Client Portal:** Finance Logix's Client Portal provides a complete user experience to clients and a whole new way to communicate with their advisor. Clients can consolidate all their account data and easily share it with their advisor without the need for repetitive data entry or the need to manage and carry their statements to every meeting.

- **Client Vault:** Finance Logix's Client Vault maintains financial planning related documents and is also integrated to bring in reports from Orion Advisor Services. Future enhancements include the ability to accommodate United Planners' documents that have been imaged via document management and CRM (Client Relationship Management) systems.

"Our approach to designing financial planning and client management tools is to use dynamic, intuitive and user-friendly technology to make it very easy to communicate technical planning concepts," noted Oleg Tishkevich, CEO of Finance Logix. "We are very pleased to work with leading firms like United Planners to enable their financial advisors and clients to meet their long-term financial goals."

About United Planners

United Planners is a full-service independent broker/dealer and registered investment advisor that is uniquely structured as a limited partnership that provides ownership opportunities to its financial advisors. United Planners was established in 1987 and is a nationwide firm that provides independence and flexibility that is supported by a strong back-office. United Planners has strategic relationships with various open-architecture service providers across the various segments of the financial industry to provide their financial advisors the tools, resources and solutions to efficiently manage and build their businesses, while adhering to high fiduciary standards. For additional information, visit United Planners' web site at **www.joinunitedplanners.com**. Member FINRA, SIPC. To request more information, contact Partner Development at 800.966.8737.

About Finance Logix

Finance Logix provides wealth management software solutions to financial services firms, including Broker-Dealers, Banks & Trusts, Insurance, Registered Investment Advisor (RIA), technology and services providers, and Asset Managers. Since 1998, Finance Logix has created financial products with the vision that users would be able to easily identify client requirements and needs, quantify future goals, and return the most highly customizable, realistic, achievable plan of action. Finance Logix is the result of extensive research and insights into what the financial services industry requires to market and deliver consistent, accurate, personalized financial advice. The wealth management industry is rapidly changing and client centric services and products are defining the new business model. Finance Logix has created a suite of fully integrated enterprise and advisor products that allows for increased client collaboration. Our client-facing software products are designed to be highly intuitive and promote interactive client participation in the planning, executing, and tracking cycles of wealth management. Finance Logix offers a compelling value proposition for clients to leverage their investment by implementing a client centric wealth management solution thus helping them to acquire client confidence and reduce the costs and complexity of integration. **www.financelogix.com**

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