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PRESS RELEASE

Moss Adams alumni launch FA Insight to provide research and consulting to financial advisors

Tacoma, WA (February 2, 2009) - Two former members of the Moss Adams LLP financial services consulting practice announce the launch of FA Insight, a firm devoted to helping both financial advisors and the firms that work with them. Dan Inveen served as Senior Research Manager and Eliza De Pardo was a Senior Consultant within the industry-leading Moss Adams team. Through FA Insight, Inveen and De Pardo plan to leverage their extensive expertise and deep understanding of industry best practices in order to help advisors unlock their true potential.

Inveen has assisted businesses with research and strategy development for more than two decades. During his Moss Adams tenure, he led a variety of high-profile research initiatives, including management of the group's annual advisory firm benchmarking initiative, the industry's definitive resource for practice management benchmarking. Prior to joining Moss Adams, Inveen managed the marketing research function for Russell Investment Group.

De Pardo has more than 12 years' experience as a consultant to the financial services industry. She brings an international perspective to the U.S. market, having worked as a senior business consultant in practice management for MLC, the wealth management division of National Australia Bank Group. De Pardo, who started in the industry as a financial planner, also served as a lecturer for the Securities Institute of Australia.

Industry leaders Mark Tibergien, Rebecca Pomeroy, and Philip Palaveev helped De Pardo and Inveen sharpen their professional expertise. They look forward to seeing their former protégées serve advisors through the new venture.

Tibergien, who left Moss Adams a little more than one year ago to become CEO of Pershing Advisor Solutions LLC, says, "I was very proud of the way in which our research at Moss Adams helped shape the best practices for how advisory firms and broker-dealers are managed. I am excited to see FA Insight build on this legacy. The team at FA Insight is well-positioned to provide much-needed business guidance for advisors during these challenging times."

Pomering, who last year transitioned from leading the Moss Adams Business Consulting Group to a new assignment as CEO of Moss Adams Wealth Advisors LLC, says, "Both of FA Insight's principals have a lengthy record of working in and with some of the industry's best firms. Their depth of experience will prove valuable for executives looking for a more optimal way to run their own firms."

Philip Palaveev, who left Moss Adams last June to join Fusion Financial Network as its CEO, adds, "As the consulting principals at Moss Adams considered the next steps in our own careers, we had a strong desire to ensure an ongoing solution would be available to advisors. The launch of FA Insight will ensure that solution is available."

Inveen and De Pardo formed FA Insight out of a strong desire to preserve for the industry a valuable and reliable source of business benchmarking information as well as solutions for addressing key business issues affecting today's advisors. FA Insight will provide consulting services and primary research for RIAs, broker-dealers and their representatives, trade and professional associations, fund companies, custodians, banks, and accounting firms.

As a Principal and Director of Research at FA Insight, Inveen notes, "Our research capabilities and the insight that is derived from it form an essential foundation for all our work. The combination of unique marketplace data, consulting expertise, and an intimate knowledge of financial advisors enables FA Insight to provide value to firms in a variety of distinct ways."

De Pardo, also a Principal of FA Insight and the Director of Consulting, said, "To be successful, advisors will need to become increasingly focused on where they spend their time, money, and energy. This means building greater clarity around their strategic direction and operating models. In addition, the best firms will differentiate based on their ability to attract and retain talent, achieve operational excellence, and deliver a superior client experience."

To meet the needs of financial services professionals in these areas, FA Insight will assist with compensation planning and the broader areas of human capital, including organizational structure design. Strategic planning, operating model development, and marketing to drive growth will also remain at the core of the firm's offer to the industry.

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Headquartered in Tacoma, Washington, FA Insight is an independent industry research and business consulting firm that serves the financial services industry.

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