

## **Capital Advisers Named The Fastest Growing Investment Advisory Firm in North Carolina With Assets Under Management Greater Than \$100 Million**

*Financial Advisor Magazine Ranks RIA Firms for Growth*

**RALEIGH, N.C. (July 26, 2007)** – *Financial Advisor* magazine has named Capital Advisers, Inc., a Raleigh-based registered investment advisory (RIA) firm, the fastest growing RIA in North Carolina in percentage growth of assets under management from December 31, 2005, through December 31, 2006, for firms with more than \$100 million under management. Capital Advisers was also listed as one of the ten largest RIAs in the Carolinas in assets under management.

“The fact that our assets under management grew nearly forty (40) percent last year is a testament to the large number of new clients seeking Capital Advisers to manage their portfolios,” said Roland Jones, president, Capital Advisers. “This is validation that quality processes and business practices relentlessly applied in an environment of intellectual depth and integrity will over time attract increasing opportunities to serve a vibrant investor base. We are humbled by our listing here and will continue to live up to our mandate to work daily to provide customized investment solutions which meet our individual and institutional clients’ expectations for state-of-the-art portfolio management.”

*Financial Advisor* magazine also touted the overall strength of RIAs and the large number of people turning to them for advice.

“While it seems a rising tide is lifting almost all ships, some independent advisors are emerging as ‘super-growers,’” wrote *Financial Advisor* magazine. “Increasingly, they are reaching out beyond the traditional business model of independent advisors and taking advantage of strategies that can distinguish them in the marketplace and help them achieve the critical mass of scale that is now seen as a long-term key to success in this industry.”

Among other strategies for achieving prudent, sustainable growth, Capital Advisers focuses on portfolio management while using other financial service providers—from banks to independent brokers to insurance agents—as significant distribution channels. Increasingly, Capital Advisers itself is reaching out to the foundation, endowment, and charitable and civic organization marketplace to provide an institutional quality investment offering tailored to those organizations’ unique status and objectives.

“As we continue to grow, we will seek to partner with local and regional foundations, endowments, and other non-profit organizations as the investment solution for their assets,” continued Jones. “We are blessed in this region to be surrounded by many fine institutions dedicated to helping our greater community. Those organizations have assets that they must be a good steward of and, in some cases, by doing so they are able to enlarge their mission. Helping to grow stronger and more financially robust and sustainable non-profits gives us a great degree of professional and personal satisfaction.”

*Financial Advisor*’s Top RIA Survey is a ranking of independent registered advisory firms based on their percentage change in assets under advisement between December 31, 2005 and December 31, 2006. To be eligible, firms had to 1) be registered as an advisor with the SEC; 2) offer financial planning services; 3) have predominantly individual clients; and 4) be independent, *i.e.*, not a subsidiary of a larger entity.

Capital Advisers ([www.capitaladvisersinc.com](http://www.capitaladvisersinc.com)) is an independent, objective, open-architecture money manager which continually researches, reviews, and monitors the investment universe and uses best practices in modern portfolio management to create and manage customized portfolios for individual and institutional clients using traditional and alternative asset classes and strategically rebalances at least quarterly all portfolios with cost, tax, and risk awareness.

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