

## UNITED CAPITAL FINANCIAL ADVISERS SELECTS PLACEMARK INVESTMENTS TO BUILD UMA PLATFORM

### Custom and Pre-Built Models Available for Individual Firms

AUGUST 12, 2008, NEWPORT BEACH, CA - United Capital Financial Advisers Inc. a national network of financial advisory firms has announced today it has selected Placemark Investments, a leader in providing wealth management solutions and the investment industry's largest independent provider of active overlay portfolio management services, to develop a new UMA program for United Capital's affiliated independent advisory firms.

The United Capital program has been built to give each regional firm in the network a choice of constructing accounts in two ways. There are pre-designed models for those firms preferring more packaged solutions, or the independent firms can opt to build a more customized solution from a roster of participating managers. In each case the individual regional firms may brand the platform under their own label.

In making the announcement, Mike Capelle, Senior Vice President of Investment Management at United Capital, said "Placemark brings the promise of traditional separate accounts much closer to reality, as well as complete portfolio oversight, true tax management, and ease of use in a cost efficient manner. These services will help our advisers around the country offer their clients exceptional investment solutions that will continue to distinguish them well into the future."

Lee Chertavian, CEO of Placemark Investments, said, "We are pleased that a growing firm such as United Capital has chosen us to help their advisers. Investors are clearly moving toward regional firms and the advantages they bring. United Capital is combining the best that regional investment advisers have to offer, while also bringing the back office and product support -like this UMA offering- that had previously been the domain of much larger firms."

### About United Capital

United Capital Financial Advisers, Inc. is a national network of financial advisory firms. It is also a strategic acquirer and operating partner of select advisory firms around the country.

United Capital provides life relevant wealth advice and objective discretionary investment services for clients. The firm does this while creating operating efficiencies and enhanced client services for every regional practice it partners with. Because of this, United Capital is the only *Transformational Acquirer™* in the United States.

United Capital was formed in 2005 by a team of seasoned wealth advisory and investment industry professionals led by Joseph Duran, CFA®. The firm has a unique combination of expertise in acquiring and transforming owner operated independent advisory practices from lifestyle businesses into large-scale, high value wealth counseling offices with access to the resources of a large national company.

*www.unitedcp.com*

### **About Placemark Investments**

Placemark Investments is the investment industry's leading overlay manager, helping advisors deliver customized Unified Managed Accounts (UMA) programs and retirement income services. Placemark's proprietary overlay technology allows advisors to develop investment solutions customized to each client's risk, tax, cash flow and social needs. Once established, Placemark continues to manage accounts according to each individual client's specific criteria, with all investment decisions made individually for each investor. Placemark helps create and administer programs for wirehouses, banks, broker/dealers, and registered investment advisors. Founded in 1999, Placemark has offices in Dallas, TX, and Wellesley, MA. For more information, please visit the company's website at [www.placemark.com](http://www.placemark.com).

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