

## **CAPITALROCK ANNOUNCES HILLIARD LYONS AS NEW CLIENT FOR THE RIGHTBRIDGE SALES SYSTEM**

**Salt Lake City, UT April 27, 2011** - CapitalRock announced today that Hilliard Lyons has licensed the RightBridge sales system. After a successful pilot, Hilliard Lyons recognized the value of RightBridge to help financial professionals identify and communicate opportunities to better serve clients while increasing wallet share.

RightBridge is a sales analytics engine which uses sophisticated business intelligence to consistently evaluate a financial professional's book of business and identify needs based suggestions for their clients. RightBridge provides financial professionals detailed reasons why each opportunity is relevant; giving both products specialists and financial professionals the information needed to engage in meaningful discussions with clients. All of this is accomplished without intervention by the financial professional —no queries, reports, etc. Opportunities simply appear on the financial professional's dashboard, with easy to implement actions that may lead to greater sales activity.

"The needs based approach used by the RightBridge system allows us to identify clients where we can expand our client relationships and provide additional products and services all while providing the best possible service to our clients" said Darryl K. Metzger, Executive Vice President, and Director of Private Client Group at Hilliard Lyons. "We received positive feedback from the Financial Consultants who participated in the pilot and look forward to our continued relationship with CapitalRock."

"Hilliard Lyons has always been an early adopter of innovative technology to provide the best possible service to its clients and we are honored to have them as a RightBridge client," commented John Hyde, CEO of Capital Rock. "We are pleased that Hilliard Lyons has chosen RightBridge to enhance their client experience. We believe the implementation of RightBridge will create value for both Hilliard Lyons and their clients."

### **About Hilliard Lyons**

Based in Louisville, Ky., Hilliard Lyons is a full service financial services firm that focuses on the creation, preservation, and distribution of its clients' wealth. The firm specializes in planning issues that include retirement, business succession, trust, and estate planning and education funding. Hilliard Lyons offers comprehensive financial services and advice, including professional managed accounts from the country's premier managers, as well as a broad menu of investment vehicles, such as stocks, bonds, options, mutual funds, annuities and insurance to facilitate the financial strategies recommended.

### **About CapitalRock**

CapitalRock, LLC is focused on maximizing sales opportunities within a company's customer base. CapitalRock was founded by a group of industry experts that have been building customer relationship and wealth management solutions for the financial services market for 20 years. The founders began using expert systems in the financial planning and wealth management arena in 1987, and over the

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years have applied various analytical and rules engines to the areas of online trading, compliance and suitability, real-time market data distribution, new account opening, and wealth management. For more information, visit <http://www.capitalrock.com>.