Customized RightBRIDGE® Annuity Wizard Tool Launched by BMO Harris Financial Advisors

Salt Lake City, Utah, (June 9, 2014) – CapitalRock is pleased to announce that financial services firm BMO Harris Financial Advisors (BHFA) has launched a version of its RightBRIDGE Annuity Wizard tool. The tool makes it easier for the financial advisors at BHFA to match annuity products to specific client needs.

Because of the contractual differences that exist between annuity contracts offered by multiple life insurance companies, choosing the most appropriate annuity for a specific client can be a challenge. Advisors must weigh the various features and benefits of multiple annuity products against the client's needs and desires. The RightBRIDGE Annuity Wizard assists financial professionals in identifying suitable annuity products for the client considering features, options, costs and benefits.

The RightBRIDGE Annuity Wizard gathers key information about a client. The analytics engine then configures and filters this information against the Broker/Dealer's list of available annuities and living benefit options. The results presented to the adviser are only those annuities that meet the client's objectives and needs. Several new features were added to the RightBRIDGE Annuity Wizard as part of the deployment at BMO Harris Financial Advisors, including the addition of specific compliance questions to the questionnaire to streamline the annuity compliance review. The printed reports feature was enhanced to add how each specific annuity may perform and how it may meet the customer's needs based on situation and preference.

"We wanted what was best for our clients - a tool that would both help our financial advisors narrow the list of available annuity contracts, while also streamlining the compliance process, and the RightBRIDGE Annuity Wizard allows us to do just that." says Mike Miroballi, President, BMO Harris Financial Advisors. "The RightBRIDGE Annuity Wizard is a significant step forward in accomplishing both initial objectives".

"In working with BMO Harris Financial Advisors. we were able to expand the capability of the RightBRIDGE Annuity Wizard to meet several of their objectives and provide a robust annuity profiling solution for their advisors. We are confident that the RightBRIDGE Annuity Wizard will provide the financial advisors at BHFA with a powerful new tool that will help them select and explain the appropriate variable annuity products for their clients". Says John Hyde, President and CEO of CapitalRock.

About BMO Harris Financial Advisors
BMO Harris Financial Advisors, Inc., offers a comprehensive range of investment advisory products that include financial planning strategies and estate planning strategies to meet the financial needs of high-net-worth clients. Offices are located throughout the U.S. Learn more at www.bmoharris.com/financialadvisors.

BMO Harris Financial Advisors(SM) is a trade name of BMO Harris Financial Advisors, Inc. Securities, investment advisory services and insurance products are offered through BMO Harris Financial Advisors, Inc. Member FINRA/SIPC. SEC-registered investment adviser. BMO Harris Financial Advisors, Inc. and BMO Harris Bank N.A. are affiliated companies. Securities and insurance products offered are: NOT A DEPOSIT - NOT INSURED BY THE FDIC OR ANY FEDERAL GOVERNMENT AGENCY - NOT GUARANTEED BY ANY BANK - MAY LOSE VALUE.

Estate planning requires legal assistance which BMO Harris Financial Advisors and its affiliates do not provide. Please consult with your legal advisor.

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About CapitalRock

CapitalRock, LLC is a leader in sale intelligence solutions for the financial services industry. CapitalRock provides the RightBRIDGE needs based suggestion engine for identifying sales opportunities and product profiling solutions. CapitalRock was founded by a group of industry experts that have been building wealth management and financial planning solutions for the financial services market for 25 years. The founders began using expert systems in the financial planning and wealth management arena in 1987, and over the years have applied various analytical and rules engines to the areas of online trading, compliance and suitability and wealth management. For more information, visit http://www.capitalrock.com.

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