

FOR IMMEDIATE RELEASE

RightBridge Sales Tool for Advisors is Integrated into SmartOffice

Salt Lake City, Utah, October 23, 2008 - CapitalRock announced today that it has integrated its RightBridge® Sales Tool with E-Z Data's SmartOffice® solution, to identify real-time sales and services opportunities for financial advisors leveraging the comprehensive CRM data within SmartOffice®.

The RightBridge® solution uses a robust rules engine to analyze clients' accounts, policies, holdings, transaction history and demographic information to determine the most appropriate and relevant sales opportunities for advisors to discuss with their clients. RightBridge provides the reasons why each opportunity is relevant; giving the advisor the information they need to engage in client discussions.

"We easily integrated RightBridge® directly into the SmartOffice® contact screen using E-Z Data's powerful SmartIntegrator®," says Doug Massey, VP Sales & Marketing at CapitalRock. "With the integration of RightBridge® when an advisor accesses a contact within SmartOffice®, they can view the suggested sales opportunities identified by RightBridge®, enabling a seamless sales process. As such, SmartOffice® customers can take advantage of the RightBridge® solution quickly, allowing their advisors to become more productive and drive significant, additional sales revenue in very little time."

Now the RightBridge® sales widgets can display in the advisors dashboard and client screens in SmartOffice®. The RightBridge widgets show advisors which clients should be contacted relative to potential sales opportunities, and some general information about the relevance of the opportunity. The advisor can then select the opportunity to link directly to the RightBridge sales system and view all of the reasons why the client is a recommended candidate for the product. Any actions taken in RightBridge are integrated back to SmartOffice. This integration will assist advisors to easily identify opportunities to cross sell and up sell, making their relationships stronger and more lucrative.

Customers of E-Z Data can take advantage of RightBridge® immediately by contacting CapitalRock at 801-951-1318 or visiting www.capitalrock.com.

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 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. The founders also pioneered the development of a component-based architecture called the Common Services Architecture (CSA) that is now widely used as a common technology platform across SunGard Data Systems. For more information, visit <http://www.capitalrock.com>.

E-Z Data

E-Z Data, Inc. provides proven web-based front office systems that support sales, marketing, and customer service for leading financial services organizations and top financial advisors worldwide. E-Z Data solutions are used by leading financial services companies, including HSBC, M Financial, MetLife, National Financial Partners, Prudential,

and Securian.

For more information, visit www.ezdata.com.

Trademark Information

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