

Edward Jones has launched the RightBRIDGE® Annuity Wizard

Salt Lake City, Utah, (September 12, 2012) – CapitalRock is pleased to announce that financial services firm Edward Jones has launched a version of its RightBRIDGE Annuity Wizard tool. The tool makes it easier for Edward Jones financial advisers 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 Edward Jones, including a newly designed user interface, expanded comparison function and reformatting the way the selected annuities are displayed. The use of reason text™ was expanded to not only explain why certain annuities are appropriate but also explain why other annuities might not be appropriate for a given client's situation.

"We were looking for a tool which would help our financial advisors narrow the list of available contracts to those that best align with a client's specific needs. The RightBridge Annuity Wizard gave us the framework to automate the process we train our advisors to use," says Tim Burke, Principal of Annuity Marketing at Edward Jones.

The RightBRIDGE Annuity Wizard is a significant step forward in making customized recommendations to clients,. Burke said.

"In working with Edward Jones 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 look forward to working with Edward Jones on an ongoing basis and we are confident that the RightBridge Annuity Wizard will provide Edward Jones advisors 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 Edward Jones,

Edward Jones provides financial services for individual investors in the United States and, through its affiliate, in Canada. Every aspect of the firm's business, from the types of investment options offered to the location of branch offices, is designed to cater to individual investors in the communities in which they

live and work. The firm's 12,000-plus financial advisors work directly with nearly 7 million clients to understand their personal goals -- from college savings to retirement -- and create long-term investment solutions that emphasize a well-balanced portfolio and a buy-and-hold strategy. Edward Jones embraces the importance of building long-term, face-to-face relationships with clients, helping them to understand and make sense of the investment options available today.

Edward Jones, which ranked No. 5 on FORTUNE magazine's "100 Best Companies to Work For 2012," is headquartered in St. Louis. The Edward Jones Web site is located at www.edwardjones.com, and its recruiting Web site is www.careers.edwardjones.com. Member SIPC.

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>.