Raymond James Insurance has launched the RightBRIDGE® Annuity Wizard

Salt Lake City, Utah, August 2, 2011 – Raymond James has long offered a wide variety of annuity products through its distribution systems. Choosing the most appropriate annuity for a specific client has always been a challenge as advisors weigh the various features and benefits of multiple annuity products against the client's needs and desires. This process has been significantly improved and simplified with the successful launch of the new RightBRIDGE Annuity Wizard, which applies expert intelligence to assist financial professionals in identifying the most suitable annuity products for the client considering features, options, costs and benefits.

Raymond James Insurance acted as a development partner with CapitalRock and assisted CapitalRock personnel in designing and configuring the RightBRIDGE Annuity Wizard for their use.

The RightBRIDGE Annuity Wizard, a new component of the RightBRIDGE sales intelligence solution, gathers key information from clients about their preferences for income, liquidity, time horizon, risk tolerance, expenses, and guarantees. The calculation engine then configures and filters the company's inventory of available annuities and living benefit options then rank orders those that best meet the client's objectives. One highly desirable feature of RightBRIDGE is that it provides robust audit text that assists the professional in communicating how the specific annuity and living benefit configuration meets the client's needs. Reason text also describes for the client and future heirs a disciplined approach used to determine suitability.

Scott Stolz, President of Raymond James Insurance commented "Given the many choices that are available in today's variable annuities, we have recognized for some time the need for a tool to help our advisors better identify the most suitable annuity option for their clients. There are numerous products on the market that provide a wealth of product information, but none of them have the capability of analyzing the various living benefits to determine which ones match up best with an individual client's retirement needs. When CapitalRock demoed the RightBRIDGE platform, we immediately thought about how it could be adapted to give us the tool we've long wanted. After working closely with CapitalRock, we are very excited to roll out a tool that we know is going to make our advisors' lives easier. By simply entering some basic client information and answering a handful of very simple questions, our advisors will be presented with a short list of variable annuity living benefits that are likely to best allow their client to meet their retirement goals. Just as importantly, the tool will allow our advisors to clearly document the suitability of their recommendation."

The RightBRIDGE Annuity Wizard is a significant step forward in making customized recommendations to clients, rather than a "one size fits all" approach.

"After deploying the RightBRIDGE sales intelligence solution at many different firms Scott Stolz and his team have been very instrumental in assisting CapitalRock in configuring and deploying the RightBRIDGE Annuity Wizard as a stand-alone product. With the large number of annuity products and features available at Raymond James from multiple insurers we are confident that the RightBRIDGE Annuity Wizard solution will simplify the annuity selection process for its professionals." Says John Hyde, President and CEO of CapitalRock.

About Raymond James Financial Services, Inc.

Raymond James Financial Services, Inc. is a national investment firm providing financial services to individuals, corporations and municipalities through more than 4,500 financial advisors in 2,000 offices throughout the United States. For more than 30 years, Raymond James Financial Services has provided a wide range of services through our affiliate, Raymond James & Associates, Inc., member New York Stock Exchange/SIPC.

About CapitalRock

CapitalRock, LLC is focused on using all existing data on clients to maximize sales opportunities within a company's book of business. 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 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 and wealth management. For more information, visit http://www.capitalrock.com.