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## **Advisor Perspectives Launches Revolutionary Service for Examining Investment Trends Among High- and Ultra-High Net Worth Investors**

*New Boston Area Venture Led by Industry Veteran Robert Huebscher*

**LEXINGTON, MA – May 8, 2007** – Advisor Perspectives, a newly founded Boston-based company, today announced the unveiling of a revolutionary service that examines the trends of high- and ultra-high net worth investors whose assets are managed by Registered Investment Advisors (RIAs). The company's website ([www.advisorperspectives.com](http://www.advisorperspectives.com)) enables RIAs and financial advisors to access revealing data about asset allocation and mutual fund selection among these elite investors, drawing on a database comprising approximately \$50 billion in assets, with an average account size of nearly \$1 million.

"Advisor Perspectives is a window into the choices independent advisors are making for their wealthiest and most valuable clients," said Robert Huebscher, the company's CEO and founder. "We provide a unique perspective on what should be top-performing assets." The company's information is based on a broad cross-section of high and ultra-high net worth investors and represents "the decisions of fee-only, independent professionals - free to select any investment vehicle," according to Huebscher. "This data is not available anywhere else in the industry."

Huebscher is a 25-year veteran of the financial services and information technology industries. He was also the founder of Thomson Financial's Investment Software Division and of Hub Data, which is now Advent Market Data, a subsidiary of Advent.

Advisor Perspectives helps RIAs and financial advisors calibrate their own asset allocation and mutual fund selection decisions. The service provides data for the entire universe and within different tiers based on account size. The highest tier, with an average account size of nearly \$4 million, shows how wealthy investors are placing their bets. Users view asset allocation data by asset class and domicile, across dimensions of market capitalization, style, bond maturity, and quality. Advisor Perspectives also ranks the most popular mutual funds and exchange traded funds (ETFs). Users see which funds attracted the most assets based on account size, asset class, domicile, and other dimensions.

To gauge industry interest, Advisor Perspectives invited a select group of executives to preview the service. From an RIA perspective, David Simmer, a principal with GW & Wade, an RIA with \$2.8 billion under management, commented, "My minimum client relationship is \$8 million, so we are keenly interested in seeing asset allocation for the upper tier of the Advisor Perspectives' universe. Of particular interest will be trends in the data, especially if it turns out that asset allocation decisions are leading indicators of market movements."

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Harold Evensky, president of Evensky & Katz, a Florida RIA with \$500 million under management, remarked, "We will be watching for mutual funds in the Advisor Perspectives universe that are not on our list. We are always interested in what others are thinking."

Industry veteran Richard Sincere, chairman and CEO of Sincere & Co., said, "This service is a major step forward for advisors trying to understand trends in the marketplace. Asset allocation and mutual fund selection needs to be customized to the needs of the client, but at least now we can see a clear benchmark of how the industry is thinking."

Advisor Perspectives also offers a free, bi-weekly, electronic newsletter that profiles individual RIA firms discussing their use of technology and the interplay between technology and investment management, and decision-making. Additional articles will focus on the topics of asset allocation and mutual fund selection. Notifications of updates to the database are also available through the newsletter. Subscriptions to the newsletter are available through the website.

For more information, please visit [www.advisorperspectives.com](http://www.advisorperspectives.com).

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