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**INVESTMENT ADVISOR MAGAZINE AND PRIMA CAPITAL ANNOUNCE
2009 SEPARATELY MANAGED ACCOUNTS AWARD WINNERS**

*5th Annual Rankings Recognize 7 “Successful Opportunists:
Management Teams and Portfolios Prevailing in Trying Times”*

NEW YORK, March 31, 2009 – *Investment Advisor* magazine and Prima Capital announced today that seven portfolio management teams have been chosen as winners of the **2009 Separately Managed Accounts (SMA) Awards**.

In the fifth annual awards, *Investment Advisor* and Prima Capital have partnered to identify separate accounts that are best in class. This year, there are seven winners in six categories including Large-Cap U.S. Equity, Mid-Cap U.S. Equity, Small-Cap U.S. Equity, International Equity, Tax-Exempt Fixed Income, and Taxable Fixed Income.

The SMA Award winners are profiled in *Investment Advisor’s* April cover story and online at www.investmentadvisor.com beginning April 1. The winners are:

- **Eaton Vance Large Cap Value Equity**, managed by Manager Michael Mach.
- **Golden Capital Management, LLC Large Cap Core**, lead managed by Jeff Moser and Greg Golden.
- **Geneva Capital Management Mid Cap Equity**, run by Portfolio Managers Amy Croen, William Priebe, Michelle Picard, and Scott Priebe.
- **Advisory Research Small/Mid Cap Value Equity**, run by David Heller, Brien O’Brien, Jim Langer, and Eric Miller.
- **Harding Loevner Management International Equity ADR**, run by Simon Hallett.
- **Breckinridge Capital Advisors, Inc. Enhanced Tax Free Income**, managed by Peter Coffin, Neil Grabowski, and David Madigan.
- **Segall Bryant & Hamill Core Fixed Income**, managed by Jim Dadura, Carolyn Moriarty, and Greg Hosbein.

“With current market conditions and increasing consolidation in the asset management industry, it is more vital, and challenging, today than ever before to find investment

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quality” said Investment Advisor Editorial Director Jamie Green. “Prima’s in-depth knowledge of the SMA landscape ensures that we are able to identify well rounded managers who are following clear, repeatable processes for our readers to discover on behalf of their clients.”

To be eligible for consideration, a separately managed account must have:

- at least \$200 million in assets
- lead-manager tenure of three years or more
- wide distribution to investment advisors and wealth managers
- rank above-average in at least four of the five categories identified by Prima. Those categories include firm quality, depth of resources, level of client service and customization, tax efficiency, and performance. Data was based on year-end 2008 statistics.

This year’s SMA Award Selection Committee included:

- J. Gibson (Gib) Watson, III, CIMA[®], Prima Capital President
- Nathan Behan, CFA, Prima Capital Director of Research.
- *Investment Advisor* Editorial Director Jamie Green
- *Wealth Manager* Editor Kathleen McBride

“In light of the volatility, uncertainty, and flux in the financial markets over the past 12 to 18 months, it is important that advisors ensure that a manager’s methods and philosophies are prudent,” said Mr. Watson. “This year’s SMA Award candidates were vetted with an increased emphasis on their approach to risk management. The winning managers have proven to be more adept than most at navigating varied market environments.”

A series of interactive webinars with the winners will be launched April 22 by Investment Advisor and Prima Capital. Further details will be forthcoming.

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About Investment Advisor Magazine

With a circulation of 110,000, *Investment Advisor* is now in its 29th year of serving independent and independent-minded investment advisors and financial planners across the United States. *Investment Advisor*, part of Summit Business Media, LLC, a leading B2B media and information company for the insurance, investment, and professional services markets, offers information and analysis on wealth management, retirement planning, investment strategies, practice management, compliance and regulatory issues, and insurance and tax planning, all designed to help registered investment advisors and independent broker/dealer representatives become more successful. For more information, visit www.investmentadvisor.com.

About Prima Capital

Prima Capital, a Matrix Financial Solutions affiliate company, is a leading provider of investment research, technology, and portfolio design to the wealth management and retirement industries. Prima conducts objective, institutional-quality research and due diligence on separately-managed accounts, mutual funds, ETFs and alternatives. This information is delivered to investment professionals' desktops via Prima's powerful investment research application, PrimaGuide™, its investment proposal system AllocationGuide™, and RetireTool(k)it, an advanced technology with all the tools a retirement plan advisor or broker needs to serve a 401(k) plan sponsor. Prima also offers asset allocation services, portfolio construction strategies and multi-manager portfolios. The company's risk based multi-manager portfolios – Prima Target Risk Portfolios – bundle the best managers from Prima's unbiased research into series of professionally managed portfolios. Prima also serves as Portfolio Strategist for the RetireFocus Funds, a series of target date collective investment funds sponsored by MG Trust Company, LLC. For more information, visit www.primacapital.com.

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