

For Immediate Release

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Loring Ward Inaugurates Retirement Plan Service with Acquisition of Tribeca Advisors, LLC

San Jose, CA – Loring Ward announced that it has signed an agreement to acquire the assets and retirement services of Tribeca Advisors, LLC.

“We were looking for a dramatic improvement to ‘traditional’ retirement solutions that we could offer to independent fee-based advisors in a cost-effective and turnkey manner.” said Alex Potts, President and Chief Executive Officer of Loring Ward. “Tribeca allows us to greatly expand our capabilities. Their innovative educational and enrollment solutions are the ideal complement to our *Structured Investing* philosophy and portfolio management service.”

Loring Ward’s new retirement plan service will be known as Loring Ward Total Retirement and will offer a wide range of plan solutions, including 401k, 403b, 457(b), Profit Sharing, Defined Benefit and 401k/Defined Benefit combos.

“The small retirement plan market is still characterized by bundled plans that are often too expensive, have hidden fees and lack prudent, professionally-built portfolios.” said Karl Huish, President and Chief Executive Officer of Tribeca. “Combining Tribeca’s expertise with Loring Ward’s scope and scale, will allow advisors to offer a compelling alternative.”

Loring Ward anticipates launching Loring Ward Total Retirement during the second quarter of 2010. Loring Ward Total Retirement will be headed up by Karl Huish, the Chief Retirement Strategist, and Erich Reinhardt, previously an advisor specializing in 401ks and former President and C.E.O. of RNP Advisory Services.

About Loring Ward

Since 1990, Loring Ward (LWI Financial Inc.) has provided Investment Management, Business Management and Practice Development to a select group of some of America’s most knowledgeable and successful independent financial advisors and their clients.

Headquartered in the heart of Silicon Valley in San Jose, California, Loring Ward is dedicated to bringing science, reason and innovation to investing through portfolio management solutions tailored to the unique requirements of successful individuals as well as small businesses and institutions. Loring Ward’s *Structured Investing* philosophy combines more than eight decades of market data, Nobel Prize-winning academic research and the latest discoveries in behavioral finance. As of 4/10, Loring Ward has almost \$5.3 billion in assets under management. For more information, please visit www.loringward.com.
