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## Probity Advisors and Wealth Services Alliance Target CPAs and 401(k) Plans with Innovative SMA-Based Investment Solutions F-Squared Investments is Featured Investment Manager

Last update: 3:56 p.m. EDT July 15, 2008

DALLAS, Jul 15, 2008 (BUSINESS WIRE) -- Probity Advisors, Inc. (R), through its joint venture with Wealth Services Alliance (R), is pleased to announce that it has launched two new initiatives targeted towards CPA firms and small- to medium-sized 401(k) plans, both of which use separately managed accounts (SMAs) as part of the offering to improve performance and reduce fees. F-Squared Investments, of Wellesley, MA, has been selected as the featured investment manager based on their performance results, low fees, and investment methodology.

The Wealth Services Alliance initiative will provide clients with access to a comprehensive package of investment services including asset allocation, active investment management, and tax management. A critical aspect of this offering is the ability to bundle tax management services along with customized asset management. This is made possible by WSA's organizational and technological integration and F-Squared's low price points. The investment solution will feature SMA portfolios, utilizing Probity's proven asset allocation methodology.

"The marketplace is clearly demanding a more holistic approach when it comes to selecting a financial service provider," said Chris Sorrow, Senior Vice President of Probity Advisors. "The blended solution of Probity's asset allocation advice, F-Squared's powerful investment strategies, and Wealth Services Alliances' tax services is one that will be hard to beat."

The 401(k) effort will feature a novel packaging of collective trusts and SMAs to deliver a more flexible and substantially less expensive offering to the small and mid-sized corporate market. By moving away from mutual funds and variable annuities, the more traditional vehicles for this market, Probity intends to provide significant cost savings along with the potential for improved performance.

"We feel that the small and mid-sized 401(k) market has been unnecessarily suffering under high fee structures and limited customization options," stated Sorrow. "Collective trusts and SMAs are now available and priced so that they will work within 401(k) plans. There really is no longer any need for variable annuity and mutual fund pricing to drive up costs, and impair performance, for the average participant."

Chris Sorrow further added "after a significant due diligence effort, we have come to the conclusion that the consistency and strength of performance over time, along with the price advantage of the F-Squared Investment models, will provide our clients and prospective partners with the best investment solution. We look forward to working with F-Squared to jointly bring these innovative initiatives to market."

Wealth Services Alliance will commence operations in July which will be followed by the launch of the 401(k) platform in August. The use of SMAs will allow Probity and Wealth Services Alliance to provide world-class investment solutions to investors with costs that are demonstrably below that of mutual fund wrap programs.

"We are thrilled to be working with Probity Advisors and Wealth Services Alliance on these initiatives," stated Howard Present, President and CEO for F-Squared. "Probity has long been recognized as a leader and innovator in providing investment solutions to their clients. These new initiatives mark an exciting new growth path for their firm, and we are delighted to be a part of their efforts."

Interested parties should contact Alissa Kaiser of Probity Advisors at (214) 891-8131.

About Probity Advisors

The principals of Probity Advisors, Inc. have over fifty years of experience following the financial markets. Probity embraces a value approach to selecting



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fairly priced equities that have demonstrated quality earnings and dividend growth. This approach to investing insulates Probity's management from participating in fads and market timing, while keeping us focused on the tenets of sound research and proper asset allocation. The result is a well diversified portfolio, carefully constructed and professionally managed. To learn more about Probity Advisors, visit us at [www.probitadvisors.com](http://www.probitadvisors.com).

About Wealth Services Alliance

Wealth Services Alliance represents a new paradigm in wealth management. Combining the expertise of McKinnon, Wootton & Associates, LLC.; Ozanne and Associates; and Probity Advisors, Inc.; Wealth Services Alliance provides a comprehensive approach to financial management through its team of experts in financial and estate planning, risk management, accounting and tax services and portfolio management. Through the integration of each of these services Wealth Services Alliance is able to provide clients with a cohesive and efficient financial experience.

About F-Squared Investments

F-Squared Investments is an SEC registered investment advisor that was founded on the premise of providing investors with the highest possible retained returns. The firm creates investment solutions with the goal of generating repeatable, consistent investment value-add and then delivering the investments with the lowest possible costs. F-Squared has a series of 18 publicly listed AlphaCycle Indexes, each consisting of a select list of highly rated actively managed mutual funds. The funds within each index are selected by institutional consultants, providing multi-manager solutions and imbedded manager rotation. F-Squared investment solutions do not, however, result in the purchase of any existing mutual funds. To learn more about F-Squared Investments and its investment approach, visit us at [www.f-squaredinvestments.com](http://www.f-squaredinvestments.com) or [www.alphacycleinvesting.com](http://www.alphacycleinvesting.com).

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