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For Immediate Release

## Industry Experts Form AllWeather Advisory Board to Provide Thought Leadership on Retirement Income and Plan Sponsor Funding Requirements

**Wellesley, MA, February 10, 2010** – F-Squared Investments is proud to announce the formation of the AllWeather Advisory Board, a diverse group of industry professionals sharing insights to improve the state-of-the-art for one of the investment industry’s most critical challenges – providing reliable retirement income for individuals and meeting annual funding requirements for pensions, endowments and foundations.

For decades, the investment industry has relied on diversification and other Modern Portfolio Theory concepts to manage risk and improve repeatability of annual withdrawal levels. However, the markets over the past decade have shown that diversification, while not broken, is also insufficient to meet the full needs of investors. The AllWeather Advisory Board was designed to assist in taking the next step forward. It includes proven industry professionals representing key components of the investment industry: business management, portfolio management, market strategy, research, government, client management, and the media.

“It is not often that a collection of professionals with such powerful resumes and diverse backgrounds comes together,” said George McClelland, Co-Founder and Vice Chairman of F-Squared Investments. “But what potentially makes this Board special is that, like F-Squared in general, we are trying to break from traditional doctrine. We have no overriding, formal deliverables. Rather, we have simply created a confidential forum to exchange ideas, concepts and research to advance the art for repeatable, reliable systematic withdrawal rates.” He added that “we know where to start, and believe we are already ahead of the curve. This Board will hopefully assist in continuing to push thought leadership forward in this very critical investment category.”

“After decades of effort, the industry standard for systematic withdrawal levels is still just 4% per year,” stated Ron Insana, President and CEO of Insana Capital Holdings and Contributor to CNBC. “As an industry, we can do better; we need to do better. I am excited to hear that early discussions of the AllWeather Advisory Board include ideas suggesting that withdrawals rates of 6% - 8% a year might be achievable.”

### ***AllWeather Advisory Board:***

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<b>Ron Santangelo</b>	Managing Director of Santangelo Investment Management and Research; former head of Merrill Lynch’s Managed Solutions and Analytics Group
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<b>Laura Dagan</b>	Former CEO and Chairman, Dwight Asset Management
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<b>Dr. Arthur Laffer</b>	Founder and Chairman of Laffer Associates; widely recognized as the “Father of Supply-Side Economics”
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<b>Ron Insana</b>	President and CEO of Insana Capital Holdings; Contributor to CNBC; former Managing Director at SAC Capital Advisers
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<b>Brad Campbell</b>	Former Assistant Secretary of Labor for Employee Benefits, and head of the Employee Benefits Security Administration (EBSA); currently Counsel at Schiff-Hardin LLP
<b>Ed D'Alelio</b>	Chair of the Investment Committee for the University of Massachusetts Endowment; former High Yield CIO at Putnam Investments
<b>Steve Mitchell</b>	COO and Board of Director Member, Retirement Income Industry Association (RIIA)
<b>Jon Holsteen</b>	Founder, former CEO and Chairman, Chicago Asset Management
<b>Bruce Fador</b>	CEO, Financial Research Corporation
<b>Arjen Kuyper</b>	President and COO, Navellier & Associates
<b>Matthew Bell</b>	Partner, Cross Financial Services Group
<b>Rick Shrier</b>	Founder and CEO, Shrier Associates
<b>Kelly Caldwell</b>	CEO, Caldwell Trust
<b>Stephen Gibson</b>	Co-Founder and Managing Partner at Boston Strategic; former CEO of Liberty Financial Mutual Funds
<b>Robert Padgett</b>	Founder and Managing Director at Klein Decisions; formerly Chief Executive Officer and Founder of Möbius Group
<b>Howard Present</b>	Co-Founder and CEO, F-Squared Investments (F-Squared representative)
<b>George McClelland</b>	Co-Founder and Vice Chairman, F-Squared Investments (F-Squared representative)

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***Thought Leadership. Cost Leadership.™***

***About F-Squared Investments:*** F-Squared Investments is an SEC-registered investment advisor. The firm creates investment solutions with the goal of generating repeatable, consistent investment value-add, delivered with the lowest possible costs. For more information, visit us at [www.f-squaredinvestments.com](http://www.f-squaredinvestments.com).

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