



American Reliance Group Selects FundQuest for Technology, Back-Office, and Investment Research Support

Boston, MA and Spokane, WA August 12, 2009—[American Reliance Group, Inc.](#), (ARG), a financial advisory firm headquartered in Spokane, Washington, has selected FundQuest to help them accelerate growth and control costs through outsourced technology, back-office, and investment research services. [FundQuest](#), a leader in outsourced managed account solutions, has 180 advisory firms as clients and more than \$40 billion in assets under management in its combined US and European operations.

Kelly Ruggles, President, founder, and owner of ARG is a well-known educator and fee-based financial planner who is the author of Financial Concerns for Retirement. Ruggles is a Chartered Life Underwriter and ARG is a Registered Investment Adviser. ARG focuses on individuals and couples who are near or already in retirement and provides customized retirement and estate planning services.

According to Kelly Ruggles, "ARG values the independence of not being tied to a single brand or set of products and we selected FundQuest because of their open architecture product offerings. We were also looking for rigorous investment research, high quality back-office administrative services, and performance reporting that is easy for our clients to understand. Using FundQuest's advisor productivity features enables us to dedicate more time to the one-to-one personal interactions that our clients value so highly."

ARG employs the custody services of Schwab Institutional and FundQuest's "Institutional Spectrum™" advisor productivity platform.

Financial advisors leverage FundQuest's flexible wealth management solutions to deliver: unified managed accounts, mutual fund advisory, hybrid active and passive portfolios, separately managed accounts, income portfolios, trust services, annuities, exchange-traded funds, and alternative -investments. FundQuest provides well-established connectivity to all of the major custody and clearing firms.

Maryanne Morrow, Vice President, National Accounts at FundQuest advised, "FundQuest's variable cost service model, based on assets under management, makes it possible for ARG to maintain control over their margins as their business expands. ARG can deliver high quality services, grow their client base, and add new products without major expenditures for technology or administrative resources. FundQuest's infrastructure, which supports more than 70,000 fee-based advisory accounts, will provide ARG with economies-of-scale."

About FundQuest

FundQuest is the best partner to RIAs, independent advisors, broker-dealers, banks, and trust institutions to help them grow, control expenses, improve profitability, and expand their product and services offerings. FundQuest's services are employed by more than 180 financial advisory firms.

The company's advanced technology, objective investment research, high quality back-office operations, and sales support services enable financial advisors to deliver highly competitive personal wealth management services.

The combined US and European operations of FundQuest have \$40 billion in assets under management and administration. FundQuest's services are offered in the U.S. through FundQuest Incorporated, a registered investment adviser based in Boston, MA.

FundQuest is part of BNP Paribas, one of the world's largest financial services firms.

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