

**Contact:**

José D. Marques  
Western & Southern Financial Group  
(513) 629-1448  
[jose.marques@wslife.com](mailto:jose.marques@wslife.com)

## **Capital Analysts Incorporated Redefines Business Strategy to Focus on Affluent and Emerging Affluent Markets**

***Wealth management firm to relocate to Cincinnati  
to leverage technology and resources of Fortune 500 parent company.***

CINCINNATI — June 7, 2007 — Capital Analysts Incorporated (Capital Analysts) announced today it has redefined its business strategy to focus on the development of wealth management services in support of independent advisors and firms serving the affluent and emerging affluent markets.

The strategy component will focus on providing wealth management advisors a turnkey back office platform that leverages best-in-class capabilities in the areas of product, service, marketing support and practice management. “The wealth management platform we are putting into place is designed to help advisors focus on building their client service offering as well as build their personal brand,” said Bob Cogan, president of Capital Analysts.

In order to take advantage of more advanced systems and processes from its parent company, Western & Southern Financial Group (Western & Southern), Capital Analysts will move the firm to Cincinnati. The move creates new jobs for which Western & Southern did not request funding by the City of Cincinnati or the State of Ohio.

“The move to Cincinnati enhances our ability to leverage state-of-the-art technology and the resources of a diversified family of companies,” said Cogan. “It is a major investment to sustain our company’s success and growth in the future. It will allow us to better support the independent advisors and firms who are servicing the affluent and emerging affluent markets, help them grow their business, and increase our competitiveness.

“We remain steadfast in our commitment to building enduring relationships with independent advisory firms serving individuals who are looking to build and preserve their wealth.”

There will be no interruption in services during the transition period, which is expected to be complete in the fourth quarter of 2007.

### **About Capital Analysts Incorporated**

Founded in 1968, Capital Analysts Incorporated was one of the very first independent financial planning broker/dealers. In the 1970s the firm was a pioneer in the application of diversification and asset allocation, which have since become standard in the industry. In the 1980s the company recognized the significance of the rapidly expanding mutual fund industry and created unbiased proprietary research, including a fund ranking system, which predated Morningstar. In the 1990s it was among the first firms to offer an “open architecture” fee-based asset management program—Capital Analysts Asset Management Services (CAAMS), with proprietary research and asset allocation models. Today, Capital Analysts is among the Top 50 independent broker/dealers in the country. The firm continues to serve as an innovator in the industry as it develops a best-of-breed Wealth Management Services platform to enable independent advisors to better serve the affluent and emerging affluent marketplace.

### **About Western & Southern Financial Group®**

Western & Southern Financial Group (Western & Southern) is a Cincinnati-based diversified family of financial services companies with assets owned, managed and under our care in excess of \$47 billion. A Fortune 500 company, Western & Southern has received A.M. Best’s highest rating of A++ Superior for financial strength, Standard & Poor’s AA+ rating (one of the 10 highest rated life insurance groups in the world) and is consistently recognized by Moody’s and Fitch for financial strength and sound management. With a heritage dating to 1888, the group’s affiliates include The Western and Southern Life Insurance Company, Western-Southern Life Assurance Company, Capital Analysts Incorporated,<sup>1,2</sup> Columbus Life Insurance Company, Eagle Realty Group, LLC, Fort Washington Investment Advisors, Inc.,<sup>1</sup> Fort Washington Savings Company,<sup>3</sup> IFS Financial Services, Inc., Integrity Life Insurance Company, The Lafayette Life Insurance Company, National Integrity Life Insurance Company, Todd Investment Advisors, Inc.,<sup>1</sup> Touchstone Advisors, Inc.,<sup>1</sup> and Touchstone Securities, Inc.<sup>2</sup> For more information, visit [www.westernsouthern.com](http://www.westernsouthern.com). Western & Southern is the title sponsor of the Western & Southern Financial Group Masters and Women’s Open tennis tournaments.

<sup>1</sup> A registered investment advisor.

<sup>2</sup> A registered broker-dealer and member NASD/SIPC.

<sup>3</sup> Member FDIC.

Ratings refer to the financial strength of the insurance company and not to the safety, stability or performance of any investment product.

Fortune 500 is a registered trademark of Time, Inc.

# # #