



## Securities America's NextPhase™ Retirement Income Solution Exceeds Expectations

OMAHA, NEB. – March 30, 2010 – Securities America, Inc. is pleased to report that demand for its NextPhase™ retirement income distribution platform has exceeded expectations. To date, there have been 322 requests for proposals, representing approximately \$339 million in investable assets. Since November 2009, assets invested through the NextPhase platform have more than tripled.

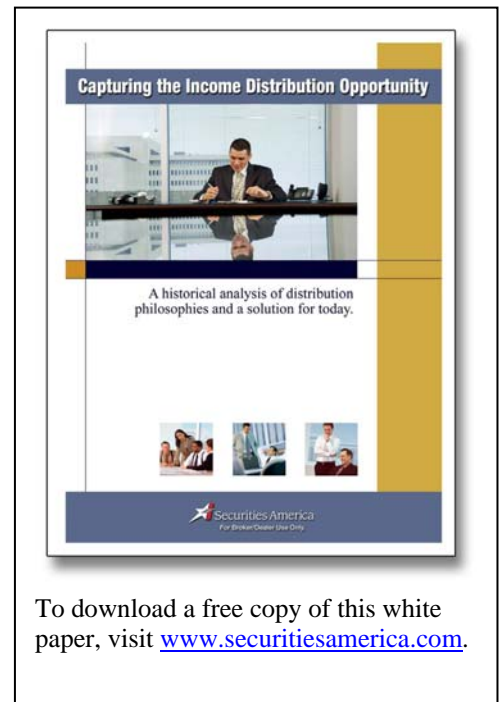
“We built out the system to include support at the marketing and proposal stages as well as to provide seamless implementation and tracking of the investment strategy through our Managed Opportunities platform,” said Dennis King, senior vice president for business development and fee-based sales.

The NextPhase program hinges on Securities America's Managed Opportunities platform, a proven investment management system powered by Envestnet. The success of NextPhase has been fueled by platform enhancements put in place in 2009, including customized time-segmented distribution tools, simplified implementation of time-segmented plans and the ability to manage and track individual client results.

To help advisors on the front-end of the client conversation, Securities America created the ROI\* Profile. ROI in this case stands for “reliability of income.” The profiling tool helps identify *The Guarantee Factor*, which measures the value a client places on a guaranteed income stream, and *The Volatility Factor*, which measures the client's sensitivity to volatility in their portfolio.

“NextPhase provides our advisors with an essential tool as they have the important retirement income conversations with clients,” said King. “The package is comprehensive and extremely robust, offering convenience with options. More than 130 of our advisors have requested proposals for their clients and the interest is growing daily.”

To download **Capturing the Income Distribution Opportunity**, a free white paper from Securities America, [click here](#) or visit <http://www.securitiesamerica.com/igsbase/igstemplate.cfm?SRC=DB&SRCN=&GnavID=21>.



To download a free copy of this white paper, visit [www.securitiesamerica.com](http://www.securitiesamerica.com).

***About Securities America***

Headquartered in Omaha, Neb., Securities America, Inc. has more than 1,900 financial professionals nationwide with more than \$53 billion in client assets under their supervision. Securities America Advisors, Inc. is an SEC-Registered Investment Advisory firm with more than \$13.9 billion in assets under management and administration that offers investment management, financial advice and financial planning through financial advisors. For more than 25 years, Securities America's mission has been to foster the success of financial professionals so they can provide quality, objective counsel and services to their clients. Additional information is available at [www.securitiesamerica.com](http://www.securitiesamerica.com).

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