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## **RYDEX | SGI HOSTS DYNAMIC RIA ADVISORY BOARD**

*Bringing together select Registered Investment Advisors (RIAs) who employ dynamic asset allocation, board seeks to foster dialogue relating to practice management, industry trends and business opportunities impacting the dynamic advisor.*

**August 12, 2009...Rockville, Maryland**—Rydex|SGI today reinforced its commitment to helping dynamic Registered Investment Advisors build their businesses and support client needs. The firm has selected 12 RIAs who employ dynamic asset allocation to participate in an advisory board to share best practices and identify industry trends and business opportunities relevant to the dynamic advisor community.

“In addition to offering advisors a forum to exchange ideas and learn from their peers, the board provides an opportunity for our firm to better serve the dynamic RIA marketplace,” says Marc Zeitoun, managing director and head of distribution at Rydex|SGI. “We look forward to receiving invaluable feedback regarding various business issues, including marketing and sales support, product development and educational, value-add programs and initiatives.”

According to Rydex|SGI AdvisorBenchmarking findings, dynamic Registered Investment Advisors represent 35% of the RIA marketplace. This effort seeks to bring together the industry’s most widely recognized, respected and highly successful advisors who employ dynamic asset allocation. Rydex|SGI has named the following RIAs to its Dynamic Advisory Board\*:

Isaac Braley, BTS Securities Corporation  
Paul Schatz, Heritage Capital LLC  
Dave Petersen, Financial Services Advisory  
Sondra Purcell, Purcell Advisory Services LLC  
Moe Ansari, Compak Asset Management  
Rob Burns, Burns Financial Advisors Inc.  
Paul Montgomery, Theta Investment Research Inc.  
Peter Mauthe, Rhoads Lucca Capital Management  
Cliff Montgomery, Scotia Partners  
Steven Chapman, Weiss Capital Management  
Ken Graves, Capital Research Advisors, LLC  
Kevin Sareyka, Schreiner Capital Management

“Rydex|SGI’s advisory board demonstrates the firm’s commitment to bringing some of the best minds together from the dynamic registered investment advisor community to offer their guidance and advisory support,” says Steve Chapman, vice president and portfolio manager at Weiss Capital Management ([www.WeissCM.com](http://www.WeissCM.com)). “I look forward to working alongside some of the industry’s most prestigious dynamic RIAs in this worthy endeavor.”

*\* Advisors mentioned are not affiliated with Rydex|SGI.*

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### **About Rydex | SGI**

Rydex|SGI is a forward-thinking asset management firm dedicated to providing high-quality, innovative investment solutions across the asset allocation spectrum to meet advisors’ diverse and evolving needs. Rydex|SGI offers a wide array of alternative investment strategies in addition to index-based and fundamental strategies—including specialty fixed-income and actively managed global, value, and growth equity. Rydex|SGI strategies are offered in multiple vehicles including mutual funds and separately managed accounts. The firm also provides advisors with a broad array of value-add programs focused on investor education and practice management.

### **About AdvisorBenchmarking, Inc., an affiliate of Rydex | SGI**

AdvisorBenchmarking is a research and analysis center focused on the RIA marketplace. Every year through its survey web site, [www.AdvisorBenchmarking.com](http://www.AdvisorBenchmarking.com), the firm conducts multiple surveys of advisors, covering a host of business management and investment management practices. The findings and analysis of the data are then released to the marketplace as annual studies, quarterly research notes and monthly newsletters. The service is aimed at helping advisors grow and enhance their firms by comparing how their businesses fare against other advisors. Advisors also learn best practices of the most successful advisors in the business. The analysis on [AdvisorBenchmarking.com](http://AdvisorBenchmarking.com) is based on the number of completed surveys and reflects only information from these surveys. This information is intended to be general and these overviews are no substitute for professional, legal or consulting advice. This information should not be construed as advice from AdvisorBenchmarking, Inc., [AdvisorBenchmarking.com](http://AdvisorBenchmarking.com), its strategic partners or their affiliates.

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