



New Web-Based Tool Helps Advisors Identify Optimal Roth Conversion Ratio

FOR IMMEDIATE RELEASE

Waltham, MA – January 28, 2009 - Convergent Retirement Plan Solutions, LLC, of Brainerd, MN, and Archimedes Systems, Inc. of Waltham, MA, announced today that they have jointly developed a next-generation Roth analytics platform to support the anticipated upsurge in Roth activity projected to occur throughout 2009 and 2010.

The first product to be released on the new analytics platform, the “*Roth IRA Conversion Optimizer*,” serves the financial advisor community and will be released in Q1 2009. A release of a consumer-oriented version is scheduled for Q2 2009.

According to Ben Norquist, president of Convergent, “As of January 1, 2010, more than 13 million affluent households representing over \$1.4 trillion in retirement assets will become eligible to take advantage of the Roth IRA conversion opportunity. Advisors who are positioned to perform sound Roth IRA conversion analyses will have a distinct advantage in the marketplace.” One of the key reasons many conventional planning tools fail to meet industry needs is they don’t adequately address partial conversion and partial consumption scenarios. “Many conventional tools assume that the Roth IRA conversion decision is an all or nothing proposition,” Norquist said, “and then compound this problem by assuming that all investors intend to consume their entire nest egg during retirement.”

Warren Hadley, president of Archimedes adds, “The real question is not should I or shouldn’t I convert to a Roth IRA, but rather, what is the optimal amount I should convert based on my personal situation. “*The Roth IRA Conversion Optimizer*” will assist the advisor and the consumer in determining this optimal conversion amount, based on each investor’s unique income needs and financial legacy objectives.”

Both the advisor and consumer versions of the “*Roth IRA Conversion Optimizer*” will be available in a branded, turn-key format as well as in a fully customized format. In addition to the jointly developed decision support web-tools, Convergent will also offer an integrated suite of Roth-focused business development tools including advisor and consumer workshops, slide calculators and educational content.

About Convergent

Convergent Retirement Plan Solutions, LLC, is a firm comprised of seasoned retirement industry veterans dedicated to creating tailored compliance, education and business development solutions for the retirement services industry. The principles of Convergent have hands-on experience in virtually all aspects of the retirement services industry from retirement product design and development to marketing, sales and distribution, to servicing and administration. For more information, visit www.convergentrps.com or call 218-824-4903.

About Archimedes

Archimedes is a leading provider of web-based college and retirement planning decision support tools and personalized communications tools that inform, educate, and motivate employees, individuals, participants, advisors and individuals. Since 1991, Archimedes has specialized in designing and building customized applications for retirement, personal finance, education funding, and employee communications. For more information, visit www.archimedes.com or call 781-647-1110.

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