

FOR IMMEDIATE RELEASE:**United Capital Financial Advisers partners with Green/White Financial Advisors to expand its national network of wealth management firms.***May 1, 2009*

Newport Beach, CA – United Capital Financial Advisers, Inc., a national network of financial advisory firms, announced that on May 1, 2009, Green/White Financial Advisors, a 25 year-old financial planning firm based in Houston, Texas, was officially welcomed into the nationwide United Capital partnership. In making the announcement, United Capital Financial Advisers CEO Joe Duran commented, “We are excited to welcome Green/White into our family of advisory firms. The collective skill sets and decades of experience their team brings to the table are extraordinary. They are a firm that really understands how to service their clients with the best advice and planning, along with open architecture solutions, and it shows with the many accolades they have been given.” Duran cited Green/White as an exceptional practice, being named one of *Barron’s* top 1000 Financial Advisers for 2009, listed as one of *Worth* magazine’s Best Financial Advisers, and one of Houston’s top financial planners in 2008.

Sandra White, Managing Director of Green/White Advisors, expressed her enthusiasm for the new partnership. “We believe our new affiliation with United Capital, a firm known for financial planning expertise, will allow us to provide our clients with the next generation of planning services and highly personal investment counsel on which we’ve built our reputation. This partnership allows us to extend the breadth of services we can offer and have access to the best independent investment solutions available through their platform.”

Benefits to the CHEVRON community

The enhanced services and national clout gained by Green/White as a result of this partnership is of particular interest to employees of Chevron. Michael Ryan, a Green/White principal, has spent more than 25 years working for Chevron and Texaco, and is extremely knowledgeable about Chevron’s benefit plans, investment choices, and retirement processes. Mr. Ryan has guided many Chevron professionals as they planned for and entered retirement.

Benefits to the Gay community

Because most states (and the federal government) do not recognize same-sex marriage, same-sex couples often face unique financial planning challenges. Though many of the planning concerns are not unique, same-sex couples need to know where the gaps are, and what extra protections can be put into place. Green/White Financial Advisors has

worked with Houston's GLBT community for many years and is keenly aware of the special needs that exist. Green/White has also been a supporter of a variety of charitable organizations within the GLBT community.

Life planning through financial control is United Capital's objective in working with clients. By selective partnering with advisory firms like Green/White, United Capital constantly strives to enhance existing services by adding new tools to analyze, evaluate, and monitor clients overall financial picture, portfolio, and long term goals, including legacy and generational issues. In addition, the network can offer more asset class choices and independent, open architecture investment solutions. All United Capital partner offices share resources, allowing advisers to service clients throughout a wider geographic area.

United Capital Financial Advisers has pioneered multiple concepts in financial planning, including its "One Best Financial Life™" planning platform, as well as the use of the "Master Plan" structure in planning for specific client financial needs. These client-centric tools were developed to allow clients to focus exclusively on the things that they can control and to track their funded status along the way to ensure that decisions made are on the right track.

United Capital Financial Advisers, Inc., based in Newport Beach, CA, is a national network of financial advisory firms. Formed in 2005 by a team of seasoned wealth advisory and investment industry professionals, the firm currently has 21 offices across the country, providing life-relevant wealth advice and objective discretionary investment advisory services to private and institutional clients, representing more than \$9 billion in assets. United Capital has a unique combination of expertise in acquiring, operating, and transforming owner-operated independent advisory practices from lifestyle businesses into large-scale, high value wealth counseling offices with access to the resources of a large national company.

For more information, please visit www.unitedcp.com.

Green/White Financial Advisors, based in Houston, Texas, is an SEC-registered, independently owned and managed investment advisory firm (RIA) providing professional investment advice tailored to the individual. Founded in 1986, the firm provides holistic strategic and financial planning advice, as well as investment management expertise, for their private wealth management clients. Green/White is committed to providing quality financial products, enhanced by cutting-edge technology. The firm has been recognized as one of the "Best Financial Advisers in the United States" by *Worth Magazine*.