

## **Capital Institutional Services Wins 22 “Best in Class” Rankings from PLANSPONSOR’S Transition Management Survey**

**Dallas, TX–May 21, 2007**—Capital Institutional Services, Inc. (CAPIS), a leading institutional broker specializing in global agency trading and independent research distribution, has announced that its Transition Management team has been awarded 22 “Best in Class” rankings in PLANSPONSOR Magazine’s 2007 Transition Management Survey.

CAPIS received “Best in Class” honors in four client categories: Public Plans, Endowments and Foundations, Small US Transitions, and Consultants.

The Consultant group gave CAPIS 14 Best in Class awards. As PLANSPONSOR noted, the consultants scored CAPIS “exceptionally well in all phases of the transition process.” Endowments and Foundations recognized CAPIS for the clarity of its pre-transition analysis, discussion of operations, management and trading details, communication and adaptability to emergent problems. From the Public Plans, CAPIS received accolades for the timeliness of its post-transition report and for its interaction with transition stakeholders. Small US firms noted CAPIS’ for its explanation of fiduciary role implications.

“We are extremely honored to receive this level of recognition across so many important transition management categories,” said Kristi Wetherington, CAPIS President and Chief Executive Officer. “While we have always prided ourselves on our technical proficiency in managing a transition, we also recognize the value of ongoing client communication. We are very pleased to be acknowledged for our capabilities in both areas.”

In congratulating CAPIS on its PLANSPONSOR awards, Laura Hamilton, Principal at Innovest Portfolio Solutions LLC commented, “We continue to use CAPIS for transition management because of their attention to detail, their high level of communication and their outstanding customer service. We have been very satisfied with CAPIS on their coordination of transitions throughout all stages of the event.”

As one of the largest independent transition managers in the industry, with no ties to custodial or money management firms, CAPIS implements transition strategies focused solely on the interests of its clients. CAPIS has developed a highly coordinated, customized transition process used to minimize cost and market impact resulting from changes in asset allocations.

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### **About Capital Institutional Services, Inc. (CAPIS)**

CAPIS is a leading U.S. institutional broker specializing in global agency trading and commission management for asset managers and plan sponsors. CAPIS has successfully developed and provided an array of brokerage solutions specifically tailored to the institutional marketplace since 1977. CAPIS is a member of the New York Stock Exchange, American Stock Exchange, the National Association of Securities Dealers, and SIPC. For more information, visit [www.capis.com](http://www.capis.com).

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