

## **Capital Institutional Services Wins 8 “Best in Class” Rankings from PLANSPONSOR’S Transition Management Survey**

**Dallas, TX–May 27, 2008–** 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 8 “Best in Class” rankings in PLANSPONSOR Magazine’s 2008 Transition Management Survey.

CAPIS was ranked Best in Class by Consultants and U.S. Small Plans participating in this year’s survey. CAPIS swept both categories, winning four out of four possible Best in Class awards for Pre-trade, Execution, Post-trade and Organization & Support.

PLANSPONSOR noted that CAPIS’s “transparency and client service” were key factors in their Best in Class acknowledgements. Comments for CAPIS were “unfailingly positive,” PLANSPONSOR continued, “with clients also raving about reporting and pricing.”

“We take great pride in our ability to not only execute transitions smoothly but to achieve the expected transition cost we’ve promised our clients,” said Kristi Wetherington, CAPIS President and Chief Executive Officer. “Education is also a key component for many consultants and smaller plans, and we take the time to make sure our clients understand every step of the transition process. It is very rewarding to be recognized by our clients in such a prestigious industry ranking.”

In congratulating CAPIS on its PLANSPONSOR awards, Lawrence Bancroft, President and Chief Investment Strategist at Bivium Capital Partners, commented, “CAPIS’ customer service is second to none. They are always available, and we have received glowing reports from our underlying managers on their communication and transition process.”

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.

PLANSPONSOR’S 2008 Transition Management survey included responses from a total of 621 institutional clients representing approximately \$300 billion in assets transitioned in 2007. Details of the survey, including methodology, can be found at <http://www.plansponsor.com/Surveys/Transition>.

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

CAPIS is a leading independent 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 Financial Industry Regulatory Authority, and SIPC. For more information, visit [www.capis.com](http://www.capis.com).

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