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PRESS RELEASE

For Immediate Release

Contact

Margaret A. Whitney
Crossbridge Financial Group, LLC
585-292-0430-phone
585-292-0779 -fax
mwhitney@crossbridgefinancial.com

Rochester NY- Crossbridge Financial Group Scores High on Client Loyalty Survey

Crossbridge Financial Group recently conducted a client loyalty survey. The survey was administered by QFinance, an independent firm that designs, administers and analyzes client loyalty surveys. QFinance is a division of QMR Inc., a global survey research firm headquartered in Overland Park, Kansas.

The results were obtained by a sampling of the Crossbridge clients and administered via written and electronic communication. The study showed that the average percent of clients that are “Satisfied” to “Extremely Satisfied” was 96.3%. The survey also indicated that clients “Intent to Stay” scores were extremely high.

The two key factors that drove positive scores were:

- Clients feel their portfolios were assembled as part of a comprehensive plan and
- Clients appreciate the complete management of their accounts.

The Average Composite Score for the Crossbridge Financial Group advisors was 185.8. The National average is 170.4. The 185.8 score places the Crossbridge Financial advisors in the Top 5% of those that QFinance surveys.

Lastly, the Standard Deviation among clients was very low. This means that client perceptions are very consistent- despite age, asset level and tenure of the client.

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