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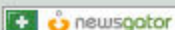
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[Home](#) | [Latest headlines](#) | [InvestEdge adds aggregation piece to ...](#)

InvestEdge adds aggregation piece to advisor tech

FWR Staff - 15 January 2008



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Pittsburgh-based **InvestEdge** has formed an alliance with financial-data provider **Evare** to give advisors using its front-office technology access to reconciled and report-ready client data.

In effect, InvestEdge is giving its institutional clients an automated aggregation capability that rivals anything they would likely be able to build on their own, says **Alois Pirker**, a senior analyst with **Aite Group**, a Boston-based business consultancy.

Feeds

This ability to gather balances, positions and transaction data for their clients' held-away assets gives advisors the wherewithal to provide their clients with comprehensive reporting and an opportunities -- because they can see more of their clients' holdings -- to offer better investment advice.

Jeff Cowley, InvestEdge's v.p. for business development, says InvestEdge chose Evare over its competitors for several reasons. For one thing, it taps into more financial institutions than its rivals -- 9,000, according to Evare -- which makes it easier to get data feeds up and running. In addition, says Cowley, "Evare does not screen scrape; [it has] direct connectivity to the quality data our clients demand."

Eight-year-old InvestEdge provides portfolio management, performance measurement, investment reporting, compliance, and relationship-management technologies to banks, trust companies, brokerage firms. Among its clients are **Greycourt and Co.**, **Huntington Bank**, **Glenmede Trust** and **Wilmington Trust**. -FWR

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