



"The quality, timeliness and accuracy of the presentations we deliver are unparalleled. This is highly valued by our high net worth and institutional clients."

**Gordon Fowler
President and CIO**

Contact Us:

www.investedge.com
800-830-1839
info@investedge.com

Quality Performance Reporting Helps Glenmede Achieve Extraordinarily High Client Retention

Glenmede's dedication to 'exceptional client service' is more than marketing speak. It is the foundation upon which the company has built its reputation for over 50 years—and the driving force behind the firm's astounding client retention rate of nearly 98 percent during recent tumultuous times.

"Loyalty and trust are earned through consistent, timely interaction," states Gordon Fowler, Glenmede's President and Chief Investment Officer. "Our success largely depends on how effectively our professionals collaborate and communicate with our clients."

According to Fowler, Glenmede's client reporting has served a pivotal role in helping to forge the long-standing relationships upon which the company relies.

"We have over 1,700 clients who entrust us with approximately 10,000 accounts totaling \$18 billion," he says. "They are sophisticated investors who expect detailed reports customized to their specific needs. I'm proud that our reports demonstrate much more than performance. They are a tangible affirmation of our commitment to providing our clients with the best possible service and information. The quality, timeliness and accuracy of the presentations are highly valued by our high net worth and institutional clients."

A Foundation for Client Service

According to Nick Voutsakis, Glenmede's Chief Technology Officer, producing large quantities of customized reports requires an internal commitment to excellence, as well as a technology partner who can help deliver on the vision.

"In 2006, we recognized InvestEdge was that company," he states. "When we began our search, we weren't looking for another vendor relationship. We wanted a true solution provider who shares our client service philosophy. The InvestEdge team clearly understood our investment process and business goals. But more importantly, their wealth management platform was developed with those processes and goals in mind."

Over the years, Glenmede's use of InvestEdge ASP has grown with time. The original implementation included tools for portfolio management, portfolio optimization and automated compliance reviews. Today, it touches virtually every aspect of the firm's investment workflow—especially when it comes to client reporting.

"InvestEdge is the go-to application for creating the high-quality reports our clients have come to expect," Voutsakis explains. "In a matter of seconds, we're able to translate very complex account, holdings, transactions and performance data into a multipage, custom report package."

About InvestEdge®, Inc.

InvestEdge® is a leading provider of wealth management solutions to large banks, trust companies, brokerage firms, and financial advisors. Through an integrated wealth management platform, InvestEdge automates key front office functions including portfolio management, performance measurement, client reporting, compliance monitoring, and trade automation. Founded in June of 2000, InvestEdge is quickly growing through the addition of major customers such as Wilmington Trust, Glenmede Trust, Keybank, Huntington Bank, TD Bank, and Greycourt and Co.