

**FOR IMMEDIATE RELEASE**

## **InvestEdge Earns Top Ranking for Client Reporting from Celent**

### **Industry Study Places InvestEdge First among Peers for Breadth of Functionality**

PHILADELPHIA, PA—January 17, 2011—InvestEdge, Inc., a leading provider of wealth management solutions to large investment firms, has been ranked as the premier client reporting solution for its breadth of functionality. InvestEdge earned the honor from Celent, a research and advisory firm dedicated to helping financial institutions formulate comprehensive business and technology strategies.

The top ranking is the result of Celent's recent industry study entitled "Client Reporting Tools." The in-depth analysis profiles and benchmarks 16 vendors within the North American and European reporting space. InvestEdge received the prestigious XCelent Award for having the most robust functionality among those that provide client reporting tools as a component of their wealth management platform.

"After the financial crisis, wealth management firms realized the necessity of providing superior customer service and communication," says Isabella Fonseca, Research Director at Celent and coauthor of the report. "InvestEdge is ideally positioned to address these goals. Their solution enables wealth managers to automate key reporting processes and thereby reallocate advisor time from manual production of reports to retention of clients."

"Client reporting is an excellent example of our ability to help investment executives solve their critical business issues and achieve their top business objectives," says Bob Stewart, President and CEO of InvestEdge. "Over 30 premier investment firms rely on our solution and our team—we're honored to be recognized by Celent for our achievements."

Alexander Camargo, Celent Analyst and coauthor of the report, adds "Solution providers that continue to expand their functionality and adapt to client demands will be future industry winners. With over ten years of experience and a rapidly growing customer list, InvestEdge is well situated against its competitors."

A complementary synopsis of the report is available. To receive a copy, email [info@investedge.com](mailto:info@investedge.com) or call 412-860-8067. A full version of the report is available for purchase from Celent at [www.celent.com](http://www.celent.com).

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**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. To learn more, visit <http://www.investedge.com> or call 1-800-830-1839. InvestEdge is a registered trademark of InvestEdge, Inc.

**About Celent**

Celent is a research and advisory firm dedicated to helping financial institutions formulate comprehensive business and technology strategies. Celent publishes reports identifying trends and best practices in financial services technology and conducts consulting engagements for financial institutions looking to use technology to enhance existing business processes or launch new business strategies. With a team of internationally experienced analysts, Celent is uniquely positioned to offer strategic advice and market insights on a global basis. Celent is a member of the Oliver Wyman Group, which is part of Marsh & McLennan Companies [NYSE: MMC].