

FOR IMMEDIATE RELEASE

InvestEdge Equips Banks and Advisors with Turnkey Compliance Solution to Proactively Monitor and Review Client Portfolios

Workflow Compliance Solution Enables Firms to Conduct Account Investment Reviews and Administrative Reviews with Less Risk and Cost

PHILADELPHIA, PA—January 29, 2009—InvestEdge, Inc., a rapidly growing provider of wealth management solutions to large investment firms, has enhanced its ability to help banks and advisors adhere to an increasingly stringent regulatory environment. The company's recently updated Compliance Solution, which is now available as a stand-alone product independent of the other InvestEdge services, equips firms to systematically monitor and review portfolios at a more granular level.

The InvestEdge compliance solution replaces manual, error-prone processes commonly applied to account investment reviews and administrative reviews. The highly configurable solution enables financial institutions to more accurately and cost-effectively adhere to regulatory requirements, firm policies, and client mandates. Likewise, the compliance solution equips advisors to adhere to more exacting standards for managing and monitoring discretionary assets—a result of last year's overturn of the "Merrill Lynch Rule."

"Firms of all types are caught in a balancing act between complying with regulations and remaining competitive with their peers," states Jeff Cowley, vice president at InvestEdge. "Across the board, their goal is to reduce the time, effort and expense of conducting account investment reviews and administrative reviews. Because our compliance solution can be implemented very quickly, firms can rapidly decrease manual efforts, increase the accuracy of reviews, and simplify external and internal review processes."

The InvestEdge compliance solution equips investment advisors, account administrators, and compliance personnel with tools to more efficiently set-up, monitor and conduct investment and administrative reviews. Embedded workflow features help users to resolve issues identified by the system, as well as guide reviews through approval processes. The highly flexible solution complements and streamlines existing review procedures and makes it easier to comply with Reg. 9 requirements.

The InvestEdge compliance solution will be showcased during a webcast on February 24 and February 26. The 30-minute interactive presentation "Proactive Compliance: The drive to adopt best practices for managed accounts" will introduce a new paradigm for reducing costs and increasing ROI by systematically monitoring, conducting and routing investment reviews and administrative reviews. To register, visit <http://www.investedge.com/webcast.html>.

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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, TD Bank, and Greycourt and Co. To learn more, visit <http://www.investedge.com> or call 1-800-830-1839.