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**FOR IMMEDIATE RELEASE**

## **InvestEdge Receives Patent for Integrated Investment Management System**

### **Award Marks Key Milestone for Pioneer of Wealth Management Solutions**

PHILADELPHIA, PA—September 22, 2009—InvestEdge, Inc., a leading provider of wealth management solutions to large investment firms, was recently awarded a patent for its “Integrated Investment Management System” by the U.S. Patent and Trademark Office.

The overlay concept protected by U.S. Patent #7,587,350 is a landmark for both InvestEdge and the investment industry as a whole. The patent further solidifies InvestEdge’s leadership in providing comprehensive front office investment management tools to banks, trust companies and advisors, and helps to ensure firms using InvestEdge technology will continue to benefit from streamlined investment processes and simplified access to investment data.

The recently-awarded patent, which is the second received by InvestEdge’s founders in recent months, describes an overlay system concept where data is refreshed from underlying books-of-record systems, without replicating accounting functions, and provides portfolio analysis, monitoring and reporting. InvestEdge uses this underlying technology as the foundation for its SaaS (Software as a Service) offering, carving out an important and rapidly growing niche in the investment technology industry.

“Investment firms already have one or more books-of-record systems such as portfolio accounting, trust accounting and stock record systems,” explains RC Collins, Chief Technology Officer and Cofounder of InvestEdge. “They don’t want or require another accounting system to provide much-needed front office functions—that’s why the overlay concept works. We’ve built an extensive, scalable technology platform that matches innovation to business needs.”

Bob Stewart, CEO and Cofounder of InvestEdge, adds, “Our success is validation that the concepts protected by our patents are a real innovation in the marketplace. Our customers and the investment industry as a whole continue to rapidly evolve and we’re committed to keeping pace.”

Stewart concludes, “It’s been a long road since we filed the original patent applications in July, 2000. Like the stock market itself, there have been highs and lows during this time. Today, it’s gratifying to know we’ve created a great company around a great product. It’s exciting to know the best is yet to come.”

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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.