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InvestEdge Simplifies Performance Measurement and Reporting for HNW and UHNW Investment Firms

Turnkey Solution Fills Demand for Scalable, Low-maintenance System

PHILADELPHIA, PA—December 9, 2008—InvestEdge, Inc., a rapidly growing provider of wealth management solutions to large HNW and UHNW investment firms, continues to gain momentum with advisors seeking a simplified approach to complex performance measurement and reporting needs.

One such firm is Tiedemann Trust Company (TTC), a leading provider of wealth management guidance and services to high net worth investors and nontaxable organizations. Since 1999, the Delaware-based company has delivered objective multi-manager investing in the context of each client's overall tax, trust, and family structure.

According to Mac Wilson, Vice President at TTC, the firm recognized the need for a performance measurement system that is easily maintained, scales with the business, and calculates accurate and timely results. Following an extensive evaluation of potential options, the company selected InvestEdge ASP.

“An important consideration for selecting InvestEdge is the system's ability to report on complex portfolios comprised of traditional investment products, as well as alternative investments,” Wilson states. “Daily returns calculated at the asset level equip us to provide highly detailed, timely reports that are a true depiction of how each client's assets are managed and performing. Plus, InvestEdge is extremely flexible. Reports can be easily customized for each client.”

While quality reporting is a critical reason for choosing a performance system, 1st Source Bank selected InvestEdge ASP due to its breadth. As the largest locally controlled financial institution serving northern Indiana and southwest Michigan, the firm needed a turnkey system for measuring and reporting on thousands of managed accounts.

“We only entrusted our previous performance provider with a fraction of our accounts,” states Paul Gifford, Vice President, Fixed Income Manager at 1st Source. “With InvestEdge ASP, all of our managed accounts receive an identical level of service. Whether we need to track and maintain composites, manage and measure consolidated family relationships, or quickly create a complex performance report, we rely on InvestEdge.”

The performance reporting system used by TTC and 1st Source is one component of the InvestEdge ASP wealth management platform. InvestEdge ASP also includes integrated tools for portfolio management, trade automation, and compliance monitoring.

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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, trade automation and relationship management. 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.