

## InvestEdge's Performance Reporting Solution Earns DALBAR's Highest Designation

*Market research firm assessed content and design of industry-leading client reports*

PHILADELPHIA, PA—May 29, 2018— InvestEdge, the leading provider of innovative financial advisory solutions, today announced it has been awarded the prestigious DALBAR Communications Seal of Excellence for Performance Reporting. The seal exemplifies a firm's commitment to client service and demonstrates a superior standard of client communication.

DALBAR, a leading financial services market research firm, conducted an extensive assessment of the [industry's leading reporting solutions](#) and awarded InvestEdge an overall "Excellent" designation, which is the highest recognition. "InvestEdge uses the client's objectives, risk profile and allocation strategy as the backdrop to nearly every conceivable benchmark comparison, clearly demonstrating variances in performance and allocations while going the extra mile by providing a detailed risk analysis, sector breakdowns and supporting all the data with colorful, intelligible charts." Jared Licklider, Manager of Research & Communications at DALBAR.

In its recent report, "*Trends & Best Practices in Performance Reporting*," DALBAR highlights the strength of InvestEdge's reporting solution in several key areas:

- Communicating security details and fundamentals, including data on the individual equity and fixed income holdings of client portfolios
- Communicating investor information, including investment objectives, investor guidance, financial professional support and more
- Communicating allocation information, including flexible segmentation options for equities, fix income, mutual funds and performance data

"With the right solution, advisors can elevate reporting from an administrative task to a key part of their client retention strategy. We enable advisors to easily create outstanding reports that demonstrate their value at a glance," said Chris Ollendike, Executive Vice President at InvestEdge. "This continued recognition from DALBAR reinforces our commitment to staying ahead of the changing needs of advisors in this very competitive market."

InvestEdge recently announced its solutions are used by more than 100 investment firms representing more than \$1 trillion in collective assets under management.

### **About InvestEdge, Inc.**

InvestEdge is a leading provider of innovative advisor solutions to financial institutions. Our integrated solutions provide a breadth of tools that simplify complicated wealth management processes and reduce overall operational risk. Using the integrated solutions automates key front office functions like easy-to-use portfolio management, trading/rebalancing, performance measurement, reporting, compliance/fiduciary monitoring, and data aggregation tools. Through MMxCHANGE, we provide a marketplace of investment products for wealth management firms.

For more information about [InvestEdge's Reporting Solution](#), please contact us today [info@investedge.com](mailto:info@investedge.com).