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InvestEdge Surpasses \$1 Trillion Milestone in Client AUM

Industry-Leading Compliance Solution Remains Key Driver of Advisory Value

PHILADELPHIA, PA—April 4, 2018— InvestEdge, the leading provider of innovative financial advisory solutions, today announced its technology now powers the management and measurement of more than \$1 trillion in assets under management across its more than 100 clients. InvestEdge provides an integrated suite of tools that simplify and streamline portfolio management, trading and rebalancing, performance reporting, compliance monitoring, data aggregation and more.

“Advisory firms choose InvestEdge because we have a proven track record and highly scalable technology that can grow with their firm,” said Brian Burns, President of InvestEdge. “Over the last two decades, our solutions have enabled advisors to navigate considerable industry shifts, most notably increased regulatory requirements.”

InvestEdge’s **compliance solution**, which set the standard for electronic, real-time monitoring more than 15 years ago, has been a key driver of the company’s growth. Today, wealth management firms rely on the InvestEdge solution to improve compliance workflows and minimize risk across their organizations.

“As advisors continue to migrate to a fiduciary standard, it’s becoming even more critical for firms to have airtight documentation of client interactions and compliance actions taken throughout the year,” said Jeff Cowley, Director of Product for InvestEdge. “We give advisory firms the tools they need to establish proactive, firm-wide policies and practices that create a culture of compliance.”

With InvestEdge’s compliance solution, advisors can prepare for regulatory audits with the knowledge that their platform has been fully vetted and time-tested against stringent OCC Reg 9 standards. Therefore, advisors are well-positioned for the expected changes to SEC standards. Even the largest firms with multiple investment channels have used InvestEdge’s best-in-class technology to successfully streamline preparation for regulatory audits.

“Compliance will remain a key focus as InvestEdge continues to grow and enable growth for our clients,” said Cowley. “We are always innovating our solutions to introduce new ways for advisory firms to improve workflows and generate revenue.”

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About InvestEdge, Inc.

InvestEdge is a leading provider of innovative advisor solutions to financial institution firms. Our integrated platform provides a full-suite of tools that simplify complicated wealth management processes and reduce overall operational risk. The full-stack solution automates key front office functions like easy-to-use portfolio management, trading/rebalancing, performance measurement, reporting, compliance/fiduciary monitoring, and data aggregation tools. Thru our subsidiary MMxCHANGE, we bring an industry first marketplace for client and investment portfolio solutions.