

InvestEdge Launches Groundbreaking Digital Investment Marketplace

MMxCHANGE helps advisory firms achieve new levels of visibility, speed and cost control in managing their third-party managers

PHILADELPHIA, PA—May 16, 2017 — InvestEdge, the leading provider of innovative financial advisory solutions, today announced the launch of MMxCHANGE, a digital marketplace that enables advisory businesses (banks, RIAs, broker dealers) to design and control their own custom investment platform. It is designed to provide an entirely new level of visibility, control and flexibility for advisors to help firms identify and recapture value trapped in their current systems and processes. Recent research has shown there is a new and urgent demand for customized advice and solutions from third party providers.

“The wealth management industry is changing fast, and advisors are looking for new ways to protect their profits and create new value for clients,” said Joseph Miskel, Executive Vice President of MMxCHANGE. “Our digital marketplace gives advisory firms and their teams unprecedented levels of control over both their managers’ performance and their fees.”

Using patent-pending technology, MMxCHANGE helps advisory firms at the enterprise and advisory level. Advisors can access both the Public Exchange and maintain their own Private Exchange. Once connected, advisors can quickly and easily monitor and measure their managers’ performance at a glance and seamlessly adjust their relationships to optimize value. The platform automatically adjusts manager fees so advisors only pay for the managers and services they use. This pay-as-you-go concept gives advisors an entirely new way to add or remove managers by month, week, or even by day. As a result, MMxCHANGE’s unbundled open architecture can reduce an advisory firm’s costs by 50 to 70 percent.

“With MMxCHANGE, we’re rethinking the way advisory businesses manage their asset managers and investment strategists,” said Bob Stewart, CEO and Co-Founder of InvestEdge. “Today’s advisors need to be able to make adjustments fast to keep up with client expectations and demands. Joe and his team have created that agile marketplace with MMxCHANGE, all available under a single contract and one monthly bill.”

The MMxCHANGE marketplace will launch with a comprehensive network of asset managers and consultants across the entire spectrum of financial advisory sectors, including fundamental, quantamental, quantitative, impact and tax-managed investing. This network will continue to expand, connecting advisory firms to the most up-to-date and innovative advice, guidance and research.

MMxCHANGE is led by Miskel, a proven innovator with diverse experience across the global financial services industry. The MMxCHANGE team includes a diverse group of technologists, strategists and wealth management professionals with decades of experience developing innovative and cutting-edge solutions for wealth advisory firms and their clients.



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MMxCHANGE seamlessly integrates with InvestEdge's suite of wealth management technology solutions and functions as a standalone solution. It will operate as a wholly owned subsidiary of InvestEdge.

To learn more and see the full list of Digital Providers available through MMxCHANGE, visit our website: www.mmxchange.com

An InvestEdge Solution

MMxCHANGE is a wholly-owned subsidiary of InvestEdge, the leader in cutting-edge wealth management solutions. Founded in 2000, InvestEdge helps advisors deliver the ultimate client experience through integrated software for managing, measuring and reporting on high net worth and ultra-high net worth portfolios. Headquartered in Bala Cynwyd, PA, InvestEdge currently administers \$1T in assets.