



NEWS RELEASE

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InvestEdge SHORTLISTED FOR THE *FAMILY WEALTH REPORT* AWARDS 2018

We are pleased to announce that InvestEdge has been shortlisted for the 2018 *Family Wealth Report* Awards in the following categories:

- Portfolio Management
- Client Communications
- Client Reporting
- Compliance

Showcasing 'best of breed' providers in the global private banking, wealth management and trusted advisor communities, the awards were designed to recognise companies, teams and individuals which the prestigious panel of judges deemed to have 'demonstrated innovation and excellence during 2017'.

Chris Ollendike, Executive Vice President of Business Development for InvestEdge said: "We are delighted to have been shortlisted for these prestigious awards. It is a great honour to be recognised in the shortlist and this is testament to the hard work that the team have put in over the last 12 months.

ClearView Financial Media's Chief Executive, and Publisher of *Family Wealth Report*, Stephen Harris, was first to extend his congratulations to the shortlisted firms. "The firms who have been shortlisted in these awards are all worthy competitors, and I would like to extend my heartiest congratulations. These awards are judged solely on the basis of entrants' submissions and their response to a number of specific questions, which had to be answered focusing on the client experience, not quantitative performance metrics. That is a unique, and I believe, compelling feature. These awards will recognise the very best operators in the private client industry, with 'independence', 'integrity' and 'genuine insight' the watchwords of the judging process - such that the awards truly reflect excellence in wealth management. Our aim is to make these annual Awards one of the brightest, and keenly contested highlights in the wealth management calendar."

Winners will be announced at a gala awards dinner which will be held in New York on March 8, 2018 at the Mandarin Oriental.

[About InvestEdge](#)

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.

[About ClearView Financial Media Ltd \(“ClearView”\)](#)

ClearView Financial Media was founded by Chief Executive, Stephen Harris in 2004, to provide high quality ‘need to know’ information for the discerning private client community. London-based, but with a truly global focus, ClearView publishes the *Family Wealth Report* group of newswires, along with research reports and newsletters, while also running a pan-global thought-leadership events programme.

With teams based in New York, London, Singapore, Switzerland, South Africa and Malaysia, the company is one of the fastest-growing media groups serving the financial services sector.

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