

InvestEdge Receives \$5 Million Growth Capital Financing to Accelerate Delivery of Digital Wealth Solutions

Rapidly growing wealth solution provider to advisors announces financing
from Vistara Capital Partners

PHILADELPHIA, PA — January 19, 2017 — InvestEdge, the rapidly growing provider of integrated digital wealth solutions to advisors, announced a \$5 million growth debt financing from Vistara Capital Partners. This is the first ever external financing transaction for InvestEdge. This financing will be used to accelerate the growth of digital investment product delivery and the company's industry-leading portfolio analytics, risk management and client reporting solutions.

"We're going to expand our services to the investment management industry and leverage the existing distribution network built on a software-as-a-service platform," said Bob Stewart, CEO at InvestEdge.

"We launched InvestEdge with a mission to simplify the integration of portfolio data and provide automated tools that enable our customers to become Bionic Advisors®."

"We are passionate about providing advisors with an integrated platform that enables them to be more proactive and spend more time with their customers" said Brian Burns, President at InvestEdge.

"Everything we do is focused on helping investment advisors build great businesses and create scalable infrastructure for future growth.

"We are very impressed by how the team at InvestEdge has been able to build its business on a bootstrapped basis" said Randy Garg, Managing Partner of Vistara Capital Partners. "InvestEdge is well-positioned to become a major competitor in the high-net-worth investment advisor segment, and we are very pleased to provide a flexible growth capital solution to help enable this growth."

Financial Technology Partners LP and FTP Securities LLC (together, "FT Partners"), acted as sole strategic advisor to InvestEdge in this transaction.

For more information about how InvestEdge will put this new capital to work helping our advisor partners, contact InvestEdge at info@investedge.com.

[About InvestEdge, Inc.](#)

[InvestEdge](#) is a leading provider of innovative advisor solutions to financial institution firms. Our award winning open architecture platform provides a full suite of tools that automates key front-office functions that include advisor dashboard, alerts, portfolio management, performance measurement, reporting, compliance monitoring, trade/rebalancing, data aggregation, client and investment (through MMxChange a subsidiary of InvestEdge) portal solutions.



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About Vistara Capital Partners

Vistara Capital Partners provides highly flexible Growth Debt & Growth Equity financing solutions to mid-later stage Technology companies across North America. Vistara's typical investment size ranges from \$3 million to \$10 million per portfolio company. Managed and funded by seasoned technology finance and operating executives, "Vistara" (sanskrit for "Expansion") is focused on enabling the growth and expansion of companies it partners with. For more information, please visit www.vistaracapital.com