

InvestEdge Wins Best Portfolio Reporting at 2017 WealthManagement.com Industry Awards

InvestEdge and MMxCHANGE also finalists in Client Portal, Compliance categories

PHILADELPHIA, PA—October 16, 2017— InvestEdge, the leader in cutting-edge wealth management solutions, has won the 2017 WealthManagement.com Industry Award for Technology Providers – Portfolio Reporting. The WealthManagement.com awards honor outstanding achievements by companies and organizations that support financial advisor success. The portfolio reporting award specifically recognizes a product or platform that enhances advisors’ ability to manage, account and report on client portfolios.

“Winning this award demonstrates our commitment to using innovative technology to empower firms and advisors to streamline their work to provide new value to their clients,” said Chris Ollendike, Executive Vice President of Business Development for InvestEdge. “We’re honored to be recognized by these industry leaders for our Client Reporting Solution.”

The InvestEdge Client Reporting Solution equips advisors to instantaneously deliver high-quality, reliable presentations by solving many of the inefficiencies inherent with report generation and customization. The patented technology automates time-intensive tasks such as data gathering, report creation, customization, and assembly.

A panel of industry leaders selected the 2017 award winners, which were presented at a black-tie ceremony at The Plaza hotel in New York City on Oct. 11, 2017. The judges evaluated based on quantitative measures of their initiatives—such as scope, scale, adoption and feature set—along with qualitative measures such as innovation, creativity and new methods of delivery.

In addition to winning the Portfolio Reporting category, InvestEdge was also named a finalist in the Technology Providers – Client Portals category. MMxCHANGE, a wholly owned subsidiary of InvestEdge, was a finalist in the Technology Providers – Compliance category. MMxCHANGE is a new digital marketplace that enables advisory businesses to design, build, and control their own custom investment platform. WealthManagement.com received a record number of submissions for the 2017 awards – nearly 500 entries were received.

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 reporting and investment portal solutions through MMxCHANGE, a subsidiary of InvestEdge.

About MMxCHANGE

MMxCHANGE is a new digital marketplace that lets you design, build, and control your own custom investment platform – at a fraction of the cost of other platforms. Its unbundled open architecture allows you to select the solutions you need, when you need them, so you can always meet your clients’ specific goals in a quickly changing market. This unprecedented flexibility enables you to scale your business at a lower cost. MMxCHANGE, a wholly-owned subsidiary of InvestEdge, seamlessly integrates with InvestEdge's suite of wealth management solutions and functions as a standalone solution.

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