Enrich the Client Experience with InvestEdge Connect

High-net-worth clients today expect access to their investment information 24/7. InvestEdge Connect goes a step further by allowing wealth managers to personalize this experience, add value to the relationship and bring clients peace of mind.

Build Lasting Relationships

Show clients they're top of mind by providing access to proprietary research, articles and videos with InvestEdge Connect. Personalize the experience with messages, reporting and content that demonstrate the value of your firm's expertise. Brand the portal as your own by adding your firm's logo and style elements.

Make Clients Part of the Process

Bring clients behind the curtain by providing the ability to view the same data their advisors use on a daily basis – including intuitive views of holdings, transactions and other account activities. Make information come alive with interactive graphs and charts, and create client report packages for clients to easily access on their own time.

Offer Complete Transparency

Provide a holistic bird's-eye view of a client's entire financial life. Deliver a complete picture with granularity through household views and account groupings that reflect all of their investment relationships, including held-away assets.

Learn more about InvestEdge's entire suite of wealth management solutions at
www.InvestEdge.com

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