

# Achieve Data Clarity

Serving high-net-worth investors today requires navigating complex account structures, diverse asset classes and multiple custodians. For too many firms, this leads to an unmanageable influx of disparate data for wealth managers to compile and analyze.

InvestEdge's data aggregation services make this easy by providing one source of high quality, validated data to share seamlessly across internal systems and third-party platforms.



## Access Comprehensive Data

- Augment books of record data with held-away assets for complete view of a client's financial life
- Gain direct point-to-point connectivity to a vast network of custodians
- Receive normalized, asset-level data including balance, positions, transactions and performance



## Automate Time-Consuming Tasks

- Free your firm from time-intensive manual reconciliation and recordkeeping with automated data consolidation
- Tailor presentation of data to include content from a wide range of sources, facilitating client meetings that drive decisions



## Enhance the Client Experience

- Provide a holistic picture of a client's wealth, regardless of where assets are custodied
- Present performance returns on internal and external assets
- Translate data into insight to increase wallet share and improve customer retention

Learn more about InvestEdge's entire suite of wealth management solutions at [www.InvestEdge.com](http://www.InvestEdge.com)

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