



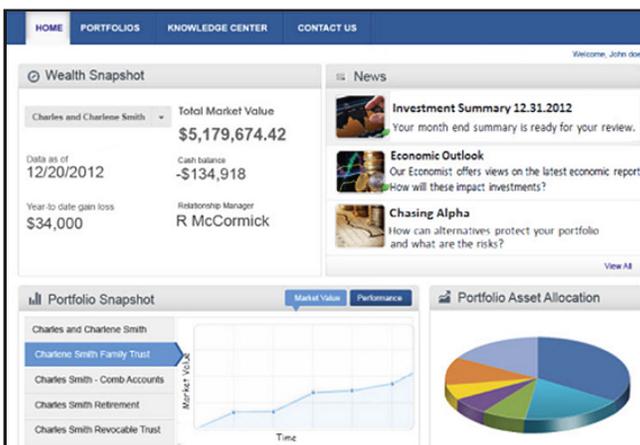
A client portal that lets your business soar.

InvestEdge Connect

Online client access, done correctly, is an opportunity to build even deeper, more trusting relationships between advisors and their clients. More robust information can be delivered online, more quickly, wherever and whenever the clients need it. InvestEdge Connect is a turnkey client portal that gives high net worth investors the ability to view the same data their advisors use on a daily basis.

Help your clients understand their investments.

Interactive and intuitive views on holdings and transactions provide insight into the investment and account activities. All data is consistent with the Advisor's platform, so the advisor and client see the same data. Make the information come alive through interactive graphs and charts. Provide transparency through



Our Client Portal serves as an online, high-touch delivery channel for all the tools and investment information your clients need to feel more confident in their relationship.

Set your company's brand apart.

Deepen your client relationships and demonstrate the value of your company's investment expertise by providing access to proprietary research, articles and videos. Personalize the experience with targeted messaging, reporting, and content – while learning what appeals to them. Configure InvestEdge Connect to display your company logo and style guide.

detailed performance, asset allocation, and gain / loss information. Create and deliver client report packages directly to the portal for convenient online access.

Enrich the client experience.

Allow your client to see their total wealth through household views and account groupings that reflect all of their investment relationships. Give them the total investment picture by including held away assets through data aggregation. Provide your clients a single location for investment commentary, articles, statements and documents, and allow them to save those that are most important to them. Communicate information through messaging. Share contact information between the relationship management team and the clients.

Go beyond the benchmark.

Help your clients navigate the complexities of the investment world. With InvestEdge as your strategic partner, you'll set your business apart, and foster deeper relationships with your clients. We'll equip you with the right set of tools to outpace the competition and grow beyond your expectations.

"InvestEdge Connect provides high net worth investors with timely access to rich data analytics and performance reports. It's a natural extension of the InvestEdge solution."

— Bob Stewart
CEO, InvestEdge

Industry Awards of Excellence recognizing InvestEdge as the leading provider of innovative wealth advisory solutions

