

Face the New Advisor Reality with Confidence

Today's advisors must cope with shrinking fees, evolving regulations, new competitors, shifting investor expectations and more. This new reality demands technology that streamlines advisor workflows and simplifies daily tasks.

InvestEdge's integrated suite of solutions enables advisors and their firms to more effectively manage, monitor and measure their wealth management programs. With powerful data management tools, advisors can focus on defining their offering and adding value to client relationships.



Portfolio Management

- Track client holdings, allocations and performance against goals and strategic policy ranges at a glance.
- Integrate your firm's management style.



Rebalancing and Trading

- Execute account rebalancing, trade analysis and order placement with ease.
- Implement trading decisions based on each client's unique requirements.



Client Communication and Reporting

- Automate burdensome, manual processes with InvestEdge's award-winning portfolio reporting solution.
- Create configurable presentations for every client and establish branding, content and distribution standards for your firm.
- Produce large volumes of reports at period-ends and on-demand presentations for client meetings.



Performance Measurement

- Identify opportunity and risk with daily returns at the position level.
- Track account consolidations, held away accounts, and composite management and reporting.



Compliance Monitoring

- Count on configurable workflows that provide management oversight
- Match risk tolerance at the client and firm level with exception-based daily portfolio monitoring.
- Use flexible review types that tie to account criteria



Data Aggregation

- Automate your client data management process and gain a full line of sight across investments.
- Provide investors a more holistic and valuable picture of their investments.



Client Portal

- Provide interactive, intuitive views of account information, client documents, proprietary research, articles and videos.
- Configure the portal to present your brand in a trusted, secure platform.

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Learn more at www.investedge.com