

## **InvestEdge Recognized for Overall Customer Satisfaction Excellence for Investment Advisors**

### **DALBAR Award Confirms Top Customer Satisfaction Leadership Position**

PHILADELPHIA, Sept. 3, 2013 /PRNewswire/ -- DALBAR, Inc. announced today that InvestEdge, Inc. was awarded DALBAR's Recognition for Excellence in Overall Customer Satisfaction. This recognition is awarded to a select group of firms that deliver superior client experience. The coveted third-party endorsement results from a rigorous audit of InvestEdge's HNW advisor clients. The analysis affirms InvestEdge's leadership position in critical areas such as clarity and consistency of client communications, quality and timeliness of performance returns, relationship management skills, cost transparency, support during testing, quality of release upgrades, and new client implementations.

The firm's reputation for outstanding service has helped to maintain the company's unprecedented advisor retention levels, helping them achieve greater than 30 percent growth year-to-year since its founding in 2000. Today, over 80 HNW investment firms rely on the solution for portfolio management, performance reporting, trade automation, and compliance monitoring.

"InvestEdge has shown solid commitment to excellence by diligently auditing and improving their processes and support, which resulted in consistent improvement in overall customer satisfaction, particularly by delivering industry leading support and service coupled with increased efficiency in their products and implementation," according to Csilla von Csiky, Managing Director & COO.

"InvestEdge is focused on client satisfaction and this award confirms that we are doing the things that matter most to our clients" says Bob Stewart, President and CEO of InvestEdge. "Our business model is very similar to the one used by our customers – annuity based revenue streams. Customer satisfaction is highly correlated to better customer retention which translates to higher revenue retention and ultimately business growth."

#### **About InvestEdge, Inc.**

InvestEdge is a leading provider of innovative advisor solutions to large banks, HNW advisors, and brokerage firms. Through an integrated wealth management platform, InvestEdge automates key front-office functions including portfolio management, performance measurement, client reporting, compliance monitoring, and trade automation. Founded in June of 2000, InvestEdge has quickly grown through the addition of major customers such as Wilmington Trust, Glenmede Trust, Keybank, Huntington National Bank, TD Bank, and Greycourt and Co. To learn more, visit <http://www.investedge.com> or call 1-800-830-1839. InvestEdge is a registered trademark of InvestEdge, Inc.

**About DALBAR**

DALBAR, Inc., the nation's leading financial services market research and consulting firm, is committed to raising the standards of excellence in the financial services industry. With offices in both the US and Canada, DALBAR develops standards for, and provides research, ratings, and rankings of intangible factors to the mutual fund, broker/dealer, life insurance, property and casualty, and managed account industries. Measurements include investor behavior, customer satisfaction, service quality, communications, Internet services, and financial professional ratings. To learn more, visit [www.DALBAR.com](http://www.DALBAR.com).