



InvestEdge Adds Former FINRA Compliance Officer to Its Team

Strengthening its industry leading Trade Surveillance and Account Monitoring Compliance platform

PHILADELPHIA, PA — May 10, 2022 — InvestEdge, Inc., a leader in innovative wealth management and compliance solutions has announced that Eileen Morris, former Associate Director in Examination Standards and Policy at FINRA and Broker Dealer and Compliance Officer, has recently joined the product team at InvestEdge. At FINRA Ms. Morris managed the Regulation Best Interest Exception Guidance Group which reviewed examination findings related to Regulation Best Interest and Form CRS. Ms. Morris will help refine and enhance the company’s existing compliance surveillance tools and will provide clients with strategic advisory services.

“I have built my career on protecting investors. I am excited to join InvestEdge and the opportunity to collaborate with the team to develop innovative compliance tools for our customers. Frontline compliance is important for firms to mitigate their risk and having effective tools is critical,” says Morris.

“We’re thrilled to welcome Eileen during this exciting period of growth for the company, said Jeffrey Cowley, President of InvestEdge. I have great admiration for Eileen’s proven expertise within the industry. Eileen will be leading our thought leadership initiative and working on our new and exciting RegBI solution.”

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About InvestEdge, Inc.

InvestEdge’s ComplianceEdge solution is a revolutionary Trade Surveillance & account Monitoring platform that enables Broker Dealers, RIAs and Bank Trust companies to provide their customers with the highest levels of stewardship, while exceeding the ever-evolving regulatory guidelines.

Learn more about [ComplianceEdge](#).