

## **InvestEdge Adds Order Management & Routing with FIX Flyer**

*Investment Professionals & Advisors Gain Significant Efficiencies in Rebalancing & Trading*

PHILADELPHIA, PA—November 13, 2017— InvestEdge, the leading provider of innovative financial advisory solutions, today announced a partnership with FIX Flyer to add order management and routing to its portfolio management system with the Flyer Trading Network and Order Management System.

Financial advisors gain significant efficiencies by eliminating the gap between order decision and execution. Advisors gain additional efficiency in managing orders and trading decisions across multiple brokers, custodians and strategies. The integration brings together the InvestEdge portfolio management system and Flyer’s order management, routing and trade allocation workflows.

“This exciting addition to our offering will streamline trading execution and post-trade processing across multiple custodians and brokers, helping wealth management firms manage trading costs and providing advisors newfound efficiency by eliminating tedious manual process,” said Chris Ollendike, Executive Vice President of Business Development for InvestEdge. “As advisors continue to seek a seamless user experience, we are pleased to offer our clients superior features and service through this integration.”

Flyer’s trade management system is a broker-neutral platform designed to optimize workflows and reduce operational risks at the organizational level by automating and centralizing trading and post-trade processing. Flyer Trading Network manages connections to all of the major custodians and brokers with a unified advisor facing API and tailored workflows for wealth management for equities, mutual funds, options, futures and fixed income.

“Our trade management platform is a natural fit with InvestEdge’s platform,” said Bradley Kellogg, COO at FIX Flyer. “The integration allows InvestEdge clients to get more done for their investors while lowering operational costs and risks and improving the investment experience.”

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

[InvestEdge](#) is a leading provider of innovative advisor solutions to financial institution firms. Our award-winning open architecture platform provides a full suite of tools that automates key front-office functions that include advisor dashboard, alerts, portfolio management, performance measurement, reporting, compliance monitoring, trade/rebalancing, data aggregation, client reporting and investment portal solutions thru MMxChange, a subsidiary of InvestEdge.

### **About FIX Flyer**

[FIX Flyer](#) connects wealth and asset managers to brokers and custodians to make managers more productive and successful. Flyer has automated the trade lifecycle with a trade order management system and a multi-asset trading network with advanced integration monitors. The platform unifies access to all custodians and brokers and delivers access to algorithmic step out trading with straightforward back office integrations and real-time insights in trading and positions.