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## **Integrated Capital Research (ICR) Partners with InvestEdge; Acquires MMxChange**

PHILADELPHIA, PA—October 6, 2021—ICR Partners, a leader in providing investment research and model delivery to banks and trust companies, and InvestEdge, a comprehensive wealth platform technology provider to banks and trust companies across their trust, brokerage, and RIA assets, have announced their strategic partnership. ICR Partners and InvestEdge have been working closely for the past 18 months in servicing asset managers and providing model delivery to InvestEdge clients. As part of the partnership, ICR Partners has acquired InvestEdge’s model manager hub, MMxChange and has integrated its delivery into ICR’s ResearchModelxChange (RMx).

ICR Partners’ ResearchModelxChange (RMx), is an integrated technology solution which encompasses model manager portfolios, research, due diligence, and marketing materials in one digital hub. ICR’s streamlined model delivery and billing process is tightly integrated with InvestEdge’s portfolio management system providing customers turnkey trading and billing workflows. ICR Partners is an SEC registered investment advisor that combines innovative technology and institutional quality investment research, and whose team has been servicing the bank/trust channel for 20+ years, delivering flexible solutions and trusted advice and guidance.

InvestEdge President, Jeffrey Cowley, summed up why the partnership and transaction made sense for InvestEdge customers; “The customers liked the flexibility and low cost of MMxChange in using 3<sup>rd</sup> party managers but needed access to quality research and consultation. The ICR Partners team understands our customers’ businesses and has years of experience providing high-touch service. RMx provides banks and trust companies a single hub to see their managers’ model portfolios and research.”

ICR President, Robert Mehringer, says, “InvestEdge has been a key partner of ICR since we launched last year. Our mutual clients have had very positive experiences working with us both, leveraging each firm’s strengths, and we are excited to expand this opportunity to all bank and trust companies as we move forward.”

For additional information, please contact Robert Mehringer of ICR Partners at [bob@icrpartners.com](mailto:bob@icrpartners.com) or Jeff Cowley of InvestEdge at [info@investedge.com](mailto:info@investedge.com).

### **About ICR Partners, LLC**

ICR Partners, with clients operating in 26 states and having more than \$280 billion in wealth assets, provides technology-enabled manager research, contracting, model delivery, and custodial support services to trust organizations. As an SEC registered investment advisor based in Arlington, Texas, ICR provides institutional quality investment delivery designed for the specific needs of each of its clients.

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

InvestEdge is a leading provider of innovative advisor solutions to financial institution firms. Their integrated platform provides a full suite of tools that simplify complicated wealth management processes and reduce overall operational risk. The full-stack solution automates key front office functions like easy-to-use portfolio management, trading/rebalancing, performance measurement, reporting, compliance/fiduciary monitoring, and data aggregation tools.