
InvestEdge Acquired by Featheringill Capital

PHILADELPHIA, PA—October 1, 2020—InvestEdge, Inc., the leading provider of compliance software to financial institutions, announced today that Featheringill Capital has acquired a majority interest in the company. Senior management supported and participated in the transaction, as it allows InvestEdge to better serve its customers with enhanced products and support. Featheringill’s backing solidifies InvestEdge’s financial position and will provide access to capital for continued investment in the company’s products. As a result of this transaction, InvestEdge will be recognized as a majority woman-owned business.

Liz Pharo, Managing Partner of Featheringill Capital, said, “The InvestEdge compliance solution is the most sophisticated we’ve seen. Given how important compliance monitoring is to a financial institution’s viability, we jumped at the chance to partner with the team at InvestEdge.”

For 20 years, InvestEdge has pioneered best-in-class compliance, reporting, UMA, and portfolio software for wealth managers. HNW and UHNW clients have unique needs that can only be met with specific and nuanced solutions. InvestEdge exists to serve these needs.

“This transaction provides InvestEdge deep strategic and committed financial support to fulfill on our mission,” said Brian Burns, InvestEdge CEO. “Featheringill’s backing ensures that we can bring the absolute best compliance and portfolio management software to wealth managers across the country. Our customers can look forward to even more responsive service and product development, while continuing to enjoy the benefits of our award-winning technology.

InvestEdge was advised by Financial Technology Partners.

About InvestEdge

InvestEdge serves Financial Institutions with software for compliance, portfolio management, and UMA accounting. The company’s software allows wealth managers to tie any data source into portfolio accounting, while providing deep visibility to an Advisor and compliance teams. The country’s leading banks and trusts already use InvestEdge. For more information, visit www.investedge.com.

About Featheringill Capital

Featheringill Capital champions a founder’s key insight to ensure his or her legacy can be fully realized. Partnering closely with existing management teams, Featheringill provides access to financial, human, and strategic resources to ensure successful and responsible growth. Featheringill Capital is headquartered in Birmingham, Alabama. For more information, visit www.featheringillcapital.com.