

## INVESTEDGE SELECTED FOR BEST IMPLEMENTATION OF A TECHNOLOGY SOLUTION

BALA CYNWYD, PA—March 16, 2015—[InvestEdge](#), Inc. a leading provider of innovative advisory solutions, proudly accepted the award for **Best Implementation of a Technology Solution** at the 2<sup>nd</sup> annual Family Wealth Report Awards 2015. The awards dinner attracts approximately 300 – 350 senior banking and wealth management professionals and was held at the exclusive Mandarin Oriental, New York.

InvestEdge strives to provide innovative solutions to challenging business needs with exceptional customer service. We are thrilled to be recognized as one of the pre-eminent players in the competitive wealth management technology solutions space.

Showcasing ‘best of breed’ providers in the global private banking, wealth management and trusted advisor communities, the awards were designed to recognise companies, teams and individuals which the prestigious panel of judges deemed to have ‘demonstrated innovation and excellence during 2014’.

"We are delighted to have been voted the winner of this prestigious award," says Brian Burns, President and COO at InvestEdge. "It is a great honor to be recognized, and a testament to the hard work that our team has put in over the last 12 months. Everyone has really pulled together to ensure we continue to deliver the highest level of service to our clients."

ClearView Financial Media's CEO, and Publisher of *Family Wealth Report*, Stephen Harris, was first to extend his congratulations to all the winners. He said: "The firms who triumphed in these awards are all worthy winners, and I would like to extend my heartiest congratulations. These awards were judged solely on the basis of entrants' submissions and their response to a number of specific questions, which had to be answered focusing on the client experience, not quantitative performance metrics. That is a unique, and I believe, compelling feature. These awards recognise the very best operators in the private client industry, with 'independence', 'integrity' and 'genuine insight' the watchwords of the judging process - such that the awards truly reflect excellence in wealth management.

### [About InvestEdge, Inc.](#)

InvestEdge is a leading provider of innovative advisor solutions to banks, HNW registered investment advisors, family offices, and brokerage firms. Founded in June of 2000, InvestEdge is now used by 106 investment firms that collectively manage assets totalling more than \$936 billion and remains to be one of the fastest growing providers of wealth management solutions to the U.S. UHNW and HNW advisor market. Through an integrated wealth management platform, InvestEdge automates key front-office functions including [portfolio management](#), [performance measurement](#), [client communications and reporting](#), [compliance monitoring](#), [trade automation](#), [data aggregation](#), and [client portal](#) solutions. To learn more, visit <http://www.investedge.com> or call 1-800-830-1839. InvestEdge is a registered trademark of InvestEdge, Inc.

### [About the Family Wealth Report Awards](#)

Launched in 2014, the Family Wealth Report awards are focused around three main category groupings: experts (individuals and teams), products, and services for wealth managers and clients and institutions of all sizes and types. Independence, integrity and genuine insight are the watchwords of the judging process. This involves specially convened expert panels drawn from both private banks and trusted advisors and support by relevant third-party organizations. Winning a Family Wealth Report award sets firms apart from their competitors and is a tangible demonstration that they have something special to offer, rewarding achievement, showcasing top class performance and innovation. The *Family Wealth Report Awards* is supported primarily by its global network of daily newswires for the wealth and private asset management

communities; *Family Wealth Report*, *WealthBriefing* and *WealthBriefingAsia*. Other supporting publications are *Offshore Red* and *Compliance Matters*.

#### **About ClearView Financial Media Ltd**

ClearView Financial Media was founded by Chief Executive, Stephen Harris in 2004, to provide high quality 'need to know' information for the discerning private client community. London-based, but with a truly global focus, ClearView publishes the *Family Wealth Report* group of newswires, along with research reports and newsletters, while also running a pan-global thought-leadership events programme.

With teams based in London, Singapore, Switzerland, South Africa and the Philippines, the company is one of the fastest-growing media groups serving the financial services sector.