

INVESTEDGE'S CLIENT REPORTING EARNS THE 2015-2016 DALBAR COMMUNICATIONS SEAL OF EXCELLENCE



PHILADELPHIA, PA—November 17, 2015— DALBAR, Inc. recently announced that [InvestEdge](#) earned its highest recognition of “Excellent” for Client Reporting, achieving a score of 82.95 out of 100.

Also known as the Communications Seal or the Seal of Excellence, the DALBAR Seal of Communications Excellence is the sign of distinction in the financial services industry. Earning the Seal is validation of a firm’s commitment to providing a superior standard of care to customers through high quality written or digital communications.

The third-party endorsement recognizes firms that produce investment reports of exceptional quality and clarity. This respected award also establishes an organization as an industry leader when it comes to meeting customer needs and providing top-notch communications. “Following a rigorous evaluation of investment report content and design, InvestEdge received this rating because of the vast breadth of financial reporting data available to advisors, and its unique ability to provide that data in a manner that is calculated to be understood by the investor. These two qualities benefit all stakeholders and combine to make InvestEdge client reporting best-in-class,” states Cory Clark, Head of Research and Due Diligence at DALBAR.

The results of the evaluation indicate that InvestEdge reports:

- Support the clients’ need to examine their portfolios from a variety of perspectives
- Support the financial advisor’s need for high-quality, high-value client communications
- Increases assets under management through expanded client relationships.

According to Brian Burns, Chief Operating Officer and President at Investedge, “Providing ‘Best in Class’ Client reporting requires a constant reevaluation of how to best service the needs of the client in a way that is easily understood, but technical enough to allow the advisor to demonstrate their investment strategy for each client. InvestEdge is committed to high quality client communications that are valuable to both client and advisor.”

[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 118 investment firms that collectively manage assets totaling more than \$954 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 a patented data unification process, supported by an integrated wealth management platform, InvestEdge simplifies complex wealth management operations and automates key front-office functions including [portfolio management](#), [performance measurement](#), [client communications and reporting](#), [compliance monitoring](#), [trade automation](#), [data aggregation](#), and [client portal](#)



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About DALBAR

DALBAR, Inc., the nation's leading financial services market research and consulting firm, is committed to raising the standards of excellence in the financial services industry. With office in both the US and Canada, DALBAR develops standards for, and provides research, ratings, and rankings of intangible factors to the mutual fund, broker/dealer, life insurance, property and casualty, and managed account industries. Measurements include investor behavior, customer satisfaction, service quality, communications, Internet services, and financial professional ratings. www.DALBAR.com.