

Unlock Efficiencies with Trading & Rebalancing Operations

Wealth managers are spending too much time manually rebalancing portfolios and managing trade orders. With InvestEdge's trading and rebalancing technology, wealth managers can simplify key functions to save time, reduce the opportunity for human error and increase account oversight.

- InvestEdge compares portfolios to targets alerting advisors to situations where capital gains will be realized and annual income will be impacted.
- InvestEdge rebalances thousands of portfolios in minutes, automating and consolidating processes that used to require days of advisors' time
- InvestEdge enables advisors to monitor portfolios for exceptions far more efficiently than relying on periodic rebalancing
- InvestEdge helps advisors create client presentations demonstrating their recommended changes.

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MAKE REBALANCING EASY



SAVE TIME WITH EASY-TO-GENERATE TRADE LISTS

- Rebalance portfolios to mirror a model or any other account in the system
- Compare a portfolio's holdings to a target and produce recommendations
- Easily exclude suggested transactions based on client desires
- Rebalance portfolios to match targets by asset class, subclass, equity holdings, and sector



GAIN TAX EFFICIENCY

- Allow front office advisors to intelligently manage equity portfolios that take tax considerations into account
- Automatically select the best tax lots to minimize capital gains
- Avoid exceeding tax budgets via alerts

SIMPLIFY TRADE EXECUTION WITH FIX FLYER



- Seamlessly access FIX Flyer's broker-neutral platform and execute trades across various asset classes, all within InvestEdge's intuitive, secure system
- Combine holdings, performance data, vendor data and other information across multiple brokers and custodians
- Monitor order flow and statuses, all while controlling costs and reducing operational risks

ABOUT INVESTEDGE

InvestEdge, a leading provider of innovative wealth management solutions, helps advisors deliver the ultimate client experience through integrated software for managing, measuring and reporting on high net worth and ultra-high net worth portfolios.

Learn more about InvestEdge's entire suite of solutions at www.investedge.com.



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