

# Redefine Compliance Monitoring at Your Firm

5.3M  
flags  
triggered

Approx  
500,000  
reviews

174  
different  
asset classes  
monitored

InvestEdge offers  
**the optimal solution**  
for regulatory reviews.

Spending too much time  
and money on compliance?

We've been empowering wealth management firms to establish and demonstrate a fiduciary process through our proven oversight tools for nearly 2 decades.

*Note: Account data is based on information collected in 2017.*

1+  
Trillion  
AUM

100+ wealth  
management  
firms

15+  
years  
experience

Here's what we can do for you...



## Save Time:

Data unified into a single interface for one or multiple investment programs.



## Reduce Risk:

Identify risks across a portfolio or household every day for all clients. Note and track open exceptions.



## Save Money:

Reduce volume of work and route tasks from front office to middle office.