



## InvestEdge Receives Recognition for Excellence for Superior Service & Support

Philadelphia, PA—July 25, 2018—InvestEdge, provider of award-winning financial advisory solutions, is being recognized by DALBAR for delivering superior service and support and earning DALBAR’s highest honor, the Recognition for Excellence. The award signifies InvestEdge’s commitment to offering a remarkable customer experience and a focus on ensuring clients are satisfied with the support they receive.

DALBAR, a leading financial services market research firm, analyzes results of an annual survey of InvestEdge customers to identify areas of strength and opportunities for improvement within the company’s customer service. This year, these results trended mainly in the positive as customers cited representatives’ ability to effectively communicate information and determination in resolving issues. This past year, InvestEdge’s Service & Support:

- ✓ Achieved the second-highest satisfaction score in the 10-year history of the survey
- ✓ Increased satisfaction scores by .29 points over the past two years

Customer service for companies providing technology solutions can be difficult, but InvestEdge demonstrates that a dedication to customer service interactions can strengthen customer relationships and improve overall satisfaction.

[InvestEdge](#) is a leading provider of innovative advisor solutions to financial institutions. Our integrated solutions provide a breadth of tools that simplify complicated wealth management processes and reduce overall operational risk. Using the integrated solutions automates key front office functions like easy-to-use portfolio management, trading/rebalancing, performance measurement, reporting, compliance/fiduciary monitoring, and data aggregation tools. Through MMxCHANGE, we provide a marketplace of investment products for wealth management firms.

[DALBAR, Inc.](#) is the financial community’s leading independent expert for evaluating, auditing and rating business practices, customer performance, product quality and service. Launched in 1976, DALBAR has earned the recognition for consistent and unbiased evaluations of investment companies, registered investment advisers, insurance companies, broker/dealers, retirement plan providers and financial professionals. DALBAR awards are recognized as marks of a superior standard of care in the financial community.

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