

InvestEdge's Award-Winning Client Reporting Solution

InvestEdge's client reporting solution gives wealth management firms a true competitive advantage by making it easier and less expensive to create outstanding reports that illustrate an advisor's value at a glance.



Quality DATA

- Daily Automated Checks
- Validation Services



Comprehensive CATALOG

- Performance Reports
- Risk-Adjusted Returns
- Attribution
- Holdings, Transactions
- Investment Policy



Extensive FLEXIBILITY

- Firm-level and Client-Specific Packages
- Ad Hoc & Bulk Production

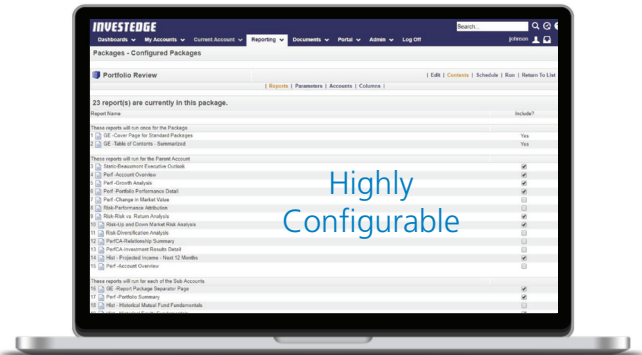
INVESTEDGE

QUALITY DATA AND COMPREHENSIVE CATALOG

- Daily quality checks and validation services
- GIPS compliant return methodology
- Daily, asset-level performance
- Configurable asset class schema
- Holistic client reporting includes held away assets.
- Extensive library of performance reports with configurable templates
- Selectable trailing periods
- Time-weighted and dollar-weighted
- Risk-adjusted returns
- Risk statistics
- Top contributors/detractors
- Attribution: selection v. allocation



EXTENSIVE FLEXIBILITY



- Flexible client communication and reporting
- Firm-level packages
- Advisor-level packages
- Client-specific packages
- Customized branding
- Ad hoc and scheduling options
- Mass production
- Define frequency
- Stagger production dates
- Multiple delivery options

INVESTEDGE'S AWARDS

Our client reporting solutions create a true competitive advantage by making it easier and less expensive to create outstanding presentations and reports that elevate an advisor's value at a glance. It's why we were named 2018 Best Reporting Solution by Private Asset Management (PAM) and Best Portfolio Reporting Solution at the 2017 WealthManagement.com awards.

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



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