

INVESTEDGE

TOP PRODUCT ATTRIBUTES

InvestEdge surveyed 206 users about their personal experience with InvestEdge's suite of investment technology solutions. Users across various roles weighed in on the top attributes of the InvestEdge application within their business.

BIGGEST VALUE INVESTEDGE PRODUCTS PROVIDE TO CLIENTS:

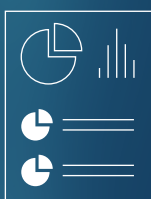
SAVING TIME

REPORTING

85%

OF FRONT OFFICE USERS REPORTED **POSITIVE FEEDBACK** ABOUT THE INVESTEDGE REPORTING SOLUTION

TOP ATTRIBUTES:



The report content is relevant to clients.

The reports are easy for clients to understand.

The reports have a professional look and feel.

PERFORMANCE

81%

OF INVESTMENT TEAM USERS REPORTED **POSITIVE FEEDBACK** ABOUT THE INVESTEDGE PERFORMANCE SOLUTION

TOP ATTRIBUTES:

- It is easy to find the performance information I need.
- I am satisfied with the indexes/benchmarks available.
- I have confidence that the performance returns are accurate.



COMPLIANCE

TOP ATTRIBUTES:

91%

OF COMPLIANCE USERS REPORTED **POSITIVE FEEDBACK** ABOUT THE INVESTEDGE COMPLIANCE SOLUTION



I can easily find the flags/accounts/reviews that need my attention.



When reviewing accounts or addressing flags, I am able to efficiently add the details and supporting information to the review or flag.



The Review Administration tools allow me to efficiently manage review due dates and workload balance throughout the year.

PORTFOLIO MANAGEMENT

TOP ATTRIBUTES:



I have the tools I need to compare client accounts to target allocations set by me or my firm.



The tax and gain/loss-related information helps me to gain a meaningful understanding of a client's tax situation.



The search tools and/or dashboards help me to identify accounts that need my attention

92%

OF ALL USERS REPORTED **POSITIVE FEEDBACK** ABOUT THE INVESTEDGE PORTFOLIO MANAGEMENT SOLUTION

TRADING & REBALANCING

88%

OF ALL USERS REPORTED **POSITIVE FEEDBACK** ABOUT THE INVESTEDGE TRADING & REBALANCING SOLUTION

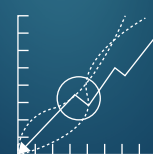
TOP ATTRIBUTES:



I am able to place the trades I need to make.



I am satisfied with the ability to perform what-if trade analysis using proposed trades.



I am able to construct a trading model that represents my desired target weights using the models available.

INVESTEDGE
We Make IT Easy

Learn more about InvestEdge's entire suite of wealth management solutions

www.investedge.com