
InvestEdge Announces New Unified Managed Account Solution

InvestEdge UMA offers innovative approach by managing assets at the product level, offering enhanced visibility and control

PHILADELPHIA, PA—August 18, 2018—InvestEdge, a leading provider of innovative financial advisory solutions, today announced the release of its unified managed account (UMA) solution. InvestEdge UMA merges multiple investment strategies into a single account and gives advisors the ability to manage assets at the product level, offering improved efficiency and control in rebalancing and client reporting.

“UMAs have evolved as a useful tool to manage various assets within a single account, but many of these solutions are divided into inflexible asset sleeves with mandated classifications set by vendors and managers,” said Chris Ollendike, Executive Vice President at InvestEdge. “InvestEdge UMA puts control in the hands of advisors, firms and their clients with product-level asset management and the ability to define those product classifications. That flexibility helps advisors create a tailored, branded experience and provides greater value for clients.”

InvestEdge UMA redefines the role of cash management in complex investment strategies and portfolio management. Improved cash management at the overall asset allocation level streamlines trading and rebalancing workflows. InvestEdge UMA facilitates a truly vehicle-agnostic investment approach, with external managers, internally managed strategies, mutual funds, ETFs and hard-to-sell assets able to be combined within a single account.

The new UMA tool optimizes tax decision making by prioritizing tax implications relevant to the client, not the manager. It streamlines trading and tax efficiency with pre-trade alerts and a block trading calculator. Analysis via customizable dashboards offers key insights into the impact of trades within managed products and on the overall account allocation.

In a recent [eBook](#), InvestEdge explains how their new breed of UMA offers more flexibility to clients while delivering operational efficiencies, control and oversight to advisors and firms. This UMA solution integrates fully and seamlessly with InvestEdge’s robust product suite, including sophisticated compliance, client reporting and portfolio management tools. Advisors can take a comprehensive approach to risk across all products. Performance can be measured and effectively communicated to the client in tailored reports at the product level via InvestEdge’s award-winning client reporting solution.

InvestEdge recently announced its solutions are used by more than 100 investment firms representing more than \$1 trillion in collective assets under management.

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About InvestEdge, Inc.

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 and reporting, compliance/fiduciary monitoring, and data aggregation tools. Through MMxCHANGE, we provide a marketplace of investment products for wealth management firms.