
InvestEdge and MMxCHANGE Named Finalists for Three 2017 WealthManagement.com Industry Awards

Annual awards program recognizes outstanding organizations and technologies that support financial advisor success

PHILADELPHIA, PA—June 5, 2017 — InvestEdge, the leading provider of innovative financial advisory solutions, and subsidiary firm MMxCHANGE have been named finalists in the WealthManagement.com 2017 Industry Awards.

InvestEdge has been nominated as a finalist in the following categories:

Technology Providers – Client Portals

[InvestEdge Connect](#) is a turnkey client portal engineered to seamlessly connect high net worth, ultra-high net worth clients, and institutional investors with their advisors and advisory firms. The portal allows investors to view the same data their advisors use on a daily basis, and enables advisors to securely deliver critical information wherever and whenever their clients need it.

Technology Providers – Portfolio Reporting

The [InvestEdge Client Reporting Solution](#) equips advisors to instantaneously deliver high-quality, reliable presentations by solving many of the inefficiencies inherent with report generation and customization. The patented technology automates time-intensive tasks such as data gathering, report creation, customization, and assembly.

MMxCHANGE, a new digital marketplace that enables advisory businesses to design, build, and control their own custom investment platform, has been nominated as a finalist in the following category:

Technology Providers – Compliance

MMxCHANGE enhances an advisor's ability to manage compliance requirements and regulations, as it affords compliance to go from reactive to proactive measures due to the level of controls offered by multi-tenant functionality. Digital Compliance Administration and Surveillance tools combined with the full control of a fiduciary, "DOL Compliant" Private Exchange, will provide compliance teams with a preemptive strategy for control. MMxCHANGE operates as a logistics center connecting advisors with the tools needed to establish a digital Fiduciary future.

"At InvestEdge, we partner with wealth management businesses to provide them with the tools they need to deepen client relationships, enhance advice and move margins," said Bob Stewart, CEO of InvestEdge. "Our client reporting and portal solutions were designed with today's advisor in mind, and being named a finalist reinforces that our cutting-edge technologies are helping them deliver true value to their clients."

“MMxCHANGE is designed to support any investment ecosystem no matter how simple or complex the business requirements,” said Joe Miskel, Executive Vice President of MMxCHANGE. “We’re pleased that WealthManagement.com is recognizing our forward-looking approach to compliance by naming us a finalist in this category.”

The WealthManagement.com Industry Awards recognize outstanding achievement in the Wealth Management industry. Details about the 2017 Awards and the complete list of finalists can be found on WealthManagement.com’s website: <http://events.wealthmanagement.com/2017-finalists/>.

Winners will be announced on October 11, 2017 at an awards ceremony in New York City.

About InvestEdge

Founded in 2000, InvestEdge, the leader in cutting-edge wealth management solutions, helps advisors deliver the ultimate client experience through integrated software for managing, measuring and reporting on high net worth and ultra-high net worth portfolios. Headquartered in Bala Cynwyd, PA, InvestEdge currently administers \$1T in assets.

About MMxCHANGE

MMxCHANGE is a new digital marketplace that lets you design, build, and control your own custom investment platform – at a fraction of the cost of other platforms. Its unbundled open architecture allows you to select the solutions you need, when you need them, so you can always meet your clients’ specific goals in a quickly changing market. This unprecedented flexibility enables you to scale your business at a lower cost. MMxCHANGE, a wholly-owned subsidiary of InvestEdge, seamlessly integrates with InvestEdge’s suite of wealth management solutions and functions as a standalone solution.

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