



For Immediate Release

Contact: Stephanie Ptak
617-723-6400
SPtak@DALBAR.com

InvestEdge Earns DALBAR Seal of Excellence for its Investment Reporting Solution

Outstanding Clarity, Depth, and Flexibility of Reports Key to Award

(Boston, MA November 17, 2011) DALBAR, Inc. announced today that InvestEdge, Inc. was awarded the DALBAR Seal of Excellence for Communications on its Client Performance Reporting Documents. The DALBAR Seal is the recognition awarded to financial service communications that display excellence in meeting the needs of their customers. The Seal is the third-party endorsement of communications that recognize the importance of communicating in a manner that is calculated to be understood by a specific investor and establishes an organization as an industry leader in this critical area. A rigorous examination and scoring of the InvestEdge Client Performance Reporting Documents by expert DALBAR Communications Analysts as well as a comparison of its offerings and overall usability to the industry at large were used to determine the Seal Diagnosis.

The results of these evaluations indicate that the InvestEdge's Client Reporting Packages successfully meet the requirements of its clients, and is outstanding in:

- Presenting data in a clear and intuitive manner
- Providing detailed information that supports the client's relationship with the financial professional.
- Providing report flexibility that allows content and degree of detail to meet the client's specific needs.

"Our clients share our belief that reports convey much more than performance returns—they are a tangible reflection of the firm's image, investment strategy, and commitment to quality service," states Brian Burns, Chief Operating Officer at InvestEdge. "We are very pleased to be recognized by DALBAR with the Seal of Communications Excellence. We're committed to maintaining our position as the leader in the investment reporting space."

About DALBAR

DALBAR, Inc., the nation's leading financial services market research and consulting firm, is committed to raising the standards of excellence in the financial services industry. With offices in both the US and Canada, DALBAR develops standards for, and provides research, ratings, and rankings of intangible factors to the mutual fund, broker/dealer, life insurance, property and casualty, and managed account industries. Measurements include investor behavior, customer satisfaction, service quality, communications, Internet services, and financial professional ratings. www.dalbar.com.

About InvestEdge, Inc.

InvestEdge is a leading provider of wealth management solutions to large banks, trust companies, brokerage firms, and financial advisors. Through an integrated wealth

management platform, InvestEdge automates key front office functions including portfolio management, performance measurement, client reporting, compliance monitoring, and trade automation. Founded in June of 2000, InvestEdge has quickly growing through the addition of major customers such as Wilmington Trust, Glenmede Trust, Keybank, Huntington National Bank, TD Bank, and Greycourt and Co. To learn more, visit www.investedge.com or call 1-800-830-1839. InvestEdge is a registered trademark of InvestEdge, Inc.

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