



NEWS RELEASE

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**MMxCHANGE SHORTLISTED FOR THE *FAMILY WEALTH REPORT* AWARDS 2018**

We are pleased to announce that MMxCHANGE has been shortlisted for the 2018 *Family Wealth Report* Awards in the following category:

- Innovative Client Solution

Showcasing 'best of breed' providers in the global private banking, wealth management and trusted advisor communities, the awards were designed to recognise companies, teams and individuals which the prestigious panel of judges deemed to have 'demonstrated innovation and excellence during 2017'.

Commenting on the firm's shortlisting, Joseph Miskel, Executive Vice President of MMxCHANGE said: "We are delighted to have been shortlisted for these prestigious awards. It is a great honour to be recognised in the shortlist and this is testament to the hard work that the team have put in over the last 12 months."

ClearView Financial Media's Chief Executive, and Publisher of *Family Wealth Report*, Stephen Harris, was first to extend his congratulations to the shortlisted firms. "The firms who have been shortlisted in these awards are all worthy competitors, and I would like to extend my heartiest congratulations. These awards are judged solely on the basis of entrants' submissions and their response to a number of specific questions, which had to be answered focusing on the client experience, not quantitative performance metrics. That is a unique, and I believe, compelling feature. These awards will recognise the very best operators in the private client industry, with 'independence', 'integrity' and 'genuine insight' the watchwords of the judging process - such that the awards truly reflect excellence in wealth management. Our aim is to make these annual Awards one of the brightest, and keenly contested highlights in the wealth management calendar."

Winners will be announced at a gala awards dinner which will be held in New York on March 8, 2018 at the Mandarin Oriental.

### [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.

### [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 ClearView Financial Media Ltd \(“ClearView”\)](#)

ClearView Financial Media was founded by Chief Executive, Stephen Harris in 2004, to provide high quality ‘need to know’ information for the discerning private client community. London-based, but with a truly global focus, ClearView publishes the *Family Wealth Report* group of newswires, along with research reports and newsletters, while also running a pan-global thought-leadership events programme.

With teams based in New York, London, Singapore, Switzerland, South Africa and Malaysia, the company is one of the fastest-growing media groups serving the financial services sector.

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