



Infovisa to Deliver Morningstar ByAllAccounts Aggregation Services

August 15, 2016, Cornelius, NC—Infovisa® today announced an agreement with Morningstar, Inc., a leading provider of independent investment research, to provide its Morningstar® ByAllAccountsSM account aggregation services to its client base. The agreement will allow Infovisa’s clients to gather information regarding held away assets using ByAllAccounts and pull the information into its MAUI® trust accounting system.

Michael Dinges, president and CEO of Infovisa, stated, “For our clients, making investment decisions involves evaluating the customer’s larger financial picture, including those outside accounts.” Dinges continued, “The tools that ByAllAccounts provides will give our clients robust data for held away accounts not on our system; thus, allowing them to make well informed decisions.”

“The wealth management industry is transitioning to a state where advisors and officers are hungry for a holistic financial view to provide better goal-based planning,” said James Carney, head of ByAllAccounts. “Infovisa recognizes this transition as they plan to place more tools such as our aggregation services in the hands of their clients.”

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About Infovisa

Infovisa is an independent provider of data processing systems and related services for bank trust departments, independent trust companies, not-for-profit foundations, colleges, and universities. The Cornelius, North Carolina company is privately held by a holding company that focuses on possessing companies that serve the financial services industry. Over the years, the family-owned holding company has initiated new companies to explore opportunistic market niches.

For more information, visit www.infovisa.com.