Infovisa Announces New Client Portal, Enhancements at Annual Client Conference

Infovisa powers clients' growth as a software provider that complements their objectives

Chicago, September 29, 2017 Infovisa hosted its 19th annual client conference in Chicago, September 20 through September 22. Over 100 client attendees attended to learn about new functionality, critical industry updates, and services available through Infovisa's strategic business partners.

The highlight of the event was the unveiling of the new Infovisa Client Portal. "The Infovisa Client Portal was built from the ground up with the latest technology and responsive design principles; a true mobile-first approach," said Mike Dinges, President and CEO of Infovisa. "The site and graphics will look great whether it is viewed on a desktop, tablet or phone. It was developed by working closely with several clients who told us they needed a stronger web presence to compete for new business and retain existing customers," Dinges went on to say.

The new Infovisa Client Portal was just one of several announcements that will enable Infovisa's clients to accomplish their growth plans. Other announcements included:

- Introduction of Infovisa's back office trust operations services through Infovisa Wealth Services, LLC, a wholly owned subsidiary of Infovisa, Inc.;
- Substantial enhancements to MAUI Investment Manager, Infovisa's fully integrated robust portfolio management product, including gain / loss optimization;
- A complete update to the graphics used on more than 20 customer statements;
- The introduction of several new strategic partners including Northern Trust (securities custody services), Virtu (real-time trading of equities and ETF's), and Total Bank Solutions (federally insured money market sweep alternative);
- The addition of several new role-based dashboard snapshots;

"Our clients are part of a thriving and highly competitive market; we take our role of helping them effectively compete seriously," said Angie Gorman, Vice President of Product Services at Infovisa. "Whether it is great client-communication tools, powerful investment management products, or increased access to real-time data, our clients know that they can rely on Infovisa to continue to develop great products for them," Gorman added.

ABOUT INFOVISA

Infovisa is a leading provider of financial technology solutions delivered to forward-thinking trust, wealth management, and retirement professionals. Infovisa's solutions empower its clients to acquire new customers, invest assets effectively, manage trust and investment portfolios efficiently, and flexibly report results to customers. Infovisa has over $120 billion in assets under administration on its trust and wealth management platform. For more information about Infovisa, visit www.Infovisa.com.