Infovisa Announces Updates to Portfolio Management Product at Annual Client Conference

Infovisa positions their clients with customizable and flexible software solutions.

Scottsdale, September 17, 2018 Infovisa hosted its 20th annual client conference in Scottsdale, September 10 through September 12. Over 100 client attendees attended to learn about new functionality, critical industry updates, and services available through strategic business partners.

There were multiple highlights at this year's conference across all Infovisa's solutions. "Our clients appreciate the role-based dashboard functionality and how the dashboards have made their entire daily process so much more efficient" said Mike Dinges, President and CEO of Infovisa. "This year, we are introducing additional functionality with the creation of modeling dashboards for investment review and rebalance," Dinges went on to say.

These new features will allow Infovisa clients to focus their time on client needs with an efficient and customizable dashboard tool. Other announcements included:

- An update on Infovisa Wealth Services, LLC, a wholly owned subsidiary of Infovisa which provides trust operations outsourcing services.
- Significant new features added to MAUI Investment Manager, Infovisa's robust and fully integrated portfolio management product.
- Introduction of account onboarding capabilities to MAUI, Infovisa's flagship trust accounting product;

"The Infovisa Client Conference is an exciting week because it highlights the care and focus that we put on our clients," said Angie Gorman, Vice President of Product Services at Infovisa. "Through feedback, we know that every client walks away with several great ideas that can be implemented to allow them to better focus on their clients," 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.

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