



## **FolioDynamix and INFOVISA Partner to Break down Technology Silos in Bank and Trust Wealth Management**

*Joint interface will enable bank and trust firms to seamlessly share information between INFOVISA trust accounting system and FolioDynamix portfolio management platform*

**NEW YORK, NY – August 25, 2015** – FolioDynamix, a leading provider of wealth management technology and advisory services, today announced a partnership with INFOVISA, an independent provider of data processing systems for bank trust departments and independent trust companies. The two companies will develop a turnkey interface that will enable trust firms to seamlessly share information across their trust accounting system and portfolio management platform. The partnership will help banks and trust firms break down barriers between their trust, brokerage and investment advisory functions and empower advisors with a more holistic view of their clients' data.

The joint technology interface will also allow INFOVISA clients to directly access advisory services from FDx Advisors, the registered investment advisor affiliate of FolioDynamix.

"We are excited about the FolioDynamix partnership and look forward to making it easier for INFOVISA clients to access next-generation rebalancing, performance measurement and proposal generation technology, as well as advisory services, all integrated with the INFOVISA trust accounting system," said Mike Dinges, president and CEO of INFOVISA.

"Our partnership with INFOVISA has the power to be a game changer for banks looking to grow their wealth management business and better align their trust and retail channels," said Bob Mehringer, executive vice president of advisory solutions at FolioDynamix. "Bank trust firms have historically been held back by technology silos that prevent advisors from gaining a holistic view of a client household, and FolioDynamix and INFOVISA are working to remove at least one of those barriers with this partnership."

## **About FolioDynamix**

FolioDynamix offers the most comprehensive web-based wealth management technology platform for managing the full advisory lifecycle – proposal generation, research, model management, portfolio accounting, trade order management, reporting, and performance analytics. Unlike other wealth management platforms, the FolioDynamix platform is truly unified to eliminate silos and empower advisors with a single platform to manage all customer accounts. FolioDynamix provides registered investment advisors, banks, broker dealers, custodians and wealth service providers with leading-edge technology to attract and retain advisors, accelerate client acquisition and gain visibility across all assets under management. The results are improved efficiency, stronger compliance, enhanced client service and faster growth. FolioDynamix is an Actua company (Nasdaq: ACTA). Visit [www.foliodynamix.com](http://www.foliodynamix.com). Follow us on Twitter @foliodx.

## **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. INFOVISA was founded in 1992 and has long been a pioneer in the wealth management arena. MAUI™ is comprised of individual modules providing the user with a customized system to meet their needs. Through a combination of proprietary software coupled with Application Service Provider (ASP) services, clients of INFOVISA are provided with a robust and comprehensive technology solution. Never before has the wealth management industry had such leading edge technology at their fingertips. For more information, please contact INFOVISA at (704) 892 -3270 or visit us on the web at [www.infovisa.com](http://www.infovisa.com).

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