



TRUST & WEALTH  
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# Press Release

## Innovest Systems Delivers Portfolio Access Via InnoVue for iPad

**New York, November 9, 2011** – Innovest Systems, LLC, a financial technology firm specializing in trust accounting and wealth management solutions, today announced that its popular end client product, InnoVue, is now accessible via iPad. InnoVue is a highly secure web-based platform that provides clients and investment managers with access to real-time portfolio information, online trading capability and multiple levels of holdings and transactional detail.

With the rising popularity of mobile computing, the days of personal home computers as a primary source of computing activity appear numbered. Designed with advances in mobile technology in mind, InnoVue functions seamlessly on the iPad. The menu navigation features and screen views, specifically designed to eliminate the need for horizontal scrolling, make InnoVue for iPad a fully functional end-client portal, adapted for mobile computing. InnoVue has been accessible via iPhone since 2009.

“Innovest has always been on the forefront of modern-era technology with our InnoTrust and InnoVue applications,” said Dwight Groenevelt, Innovest’s vice president of product management. “Extending our advanced solutions to mobile computing is an example of how Innovest’s technology benefits reach beyond our immediate clients to those of our clients’ customers. Whether being used by an account holder to place straight-through-trades from their living room or by investment advisors reviewing an account with their client at the kitchen table, InnoVue on the iPad offers the flexibility to be mobile.”

“We are thrilled to offer our clients the ability to access portfolio information in the palm of their hand,” said Kelli Click, chief operating officer of Self Directed IRA Services, Inc. “The InnoVue platform provides a fully functional and highly configurable solution on both traditional desktop browsers and mobile devices.”

### **About Innovest Systems**

Innovest Systems, LLC is a financial technology firm that provides technology-driven solutions to trust and wealth management companies. Innovest’s flagship product, InnoTrust, delivers a secure, integrated, real-time system offered in a Software as a Service (SaaS) environment. Innovest’s technology meets the needs of the world’s largest global financial services firms, as well as smaller independent trust and wealth management companies. Innovest is headquartered in New York City. For more information about Innovest Systems, visit [www.innovestsystems.com](http://www.innovestsystems.com).

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