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Edison Venture Completes Follow-on Investment in FolioDynamix Supports Growth of NYC-based Wealth Management Technology Leader

LAWRENCEVILLE, NJ, January 3, 2011 – FolioDynamix, the leading provider of on-demand technology and product solutions to wealth management advisory industry, announced a \$16 million investment by Edison Ventures and ABS Capital Partners. FolioDynamix will use the funds to expand product and technology platform and increase sales and marketing investment. Edison’s cumulative investment reached \$12 million.

“Edison’s experience in the Financial Technology industry has been a valuable asset in accelerating our growth. Edison provides more than capital, Chris and the other Edison directors are my first calls when I want to discuss strategic issues”, said FolioDynamix CEO Joseph Mrak.

FolioDynamix offers both a technology platform and advisory services. FDx SingleSight, the company’s wealth servicing platform, is a customizable turn-key asset management program. The company addresses specific needs of end customers without additional costs or limits to flexibility. FDx Advisors, a registered investment advisor, has daily oversight of more than \$13.6 billion in assets, offers institutional quality third-party manager research and access, custom investment program development, and discretionary investment solutions. Customers can choose technology and advisory services in tandem or separately. Thus allowing advisors to focus on their clients’ growing and changing needs. FolioDynamix has over 4.5 million accounts utilizing aspects of its total platform.

“FolioDynamix customers value the management team’s industry knowledge and the flexible products,” stated Chris Sugden, Edison Venture Managing Partner. “The Company has separated itself from the competition with the latest version. This investment will allow the Company to continue to lead the industry in innovation and flexibility.

Edison has invested in 34 [Financial Technology](#) companies. Successful exits include Best Software, DPM, Edgetrade, E-Transport, Gain Capital, Incurrent, Longview Solutions and Princeton Financial. Active portfolio companies include Andera, Archive Systems, Billtrust, Business Financial Services, Correctnet, FolioDynamix, IPP, Liberty Tax, Neat, Scivantage, Tangoe and TraderTools. Chris Sugden leads Edison’s Fintech team of Michael Kopelman, Mike Cichowski and Tom Vander Schaaff.

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About Edison Ventures

Established in 1986, Edison partners with entrepreneurs, service providers and other financing sources to build successful companies. Edison provides capital and value-added services to late stage (\$5 to 20 million revenue), information technology businesses. Initial investments range from \$5 to 10 million. Edison typically serves as sole or lead investor. In addition to providing expansion capital, Edison funds management buyouts, recapitalizations, spinouts and secondary stock purchases.

Edison's investment professionals are based in Lawrenceville, NJ, Needham, MA, New York, NY, and McLean, VA. Industry specialties include interactive marketing, financial technology, healthcare IT application software and communications. Edison's successes include Axent, Cambridgesoft, Dendrite, Marcam, Mathsoft, Virtual Edge, Visual Networks, Vocus and many other information technology leaders, which have a combined market value exceeding \$5 billion. Edison Ventures currently manages over \$650 million and actively making new investments.

www.edisonventures.com

About FolioDynamix

Headquartered in New York, NY, with offices in Sacramento, CA and Columbus, OH, privately held FolioDynamix is changing the way sponsors, managers and advisors conduct business, efficiently and productively, in wealth management. With its FDX and FDX Advisors value propositions – a wealth servicing platform and registered investment advisor, respectively – FolioDynamix offers a seamless, scalable solution for any fee-based product with over 4.5 million accounts running daily on the platform. FDX Advisors is providing daily oversight of more than \$13.6 BB in assets. FolioDynamix is also recognized as the industry's leader in wealth servicing innovation, platform technology modernization, as well as the singular provider of a bundled or unbundled turnkey asset management program (TAMP). For more information on FolioDynamix, please visit www.foliodynamix.com.

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