



For immediate release

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Jemstep Announces Completion of SOC 2 Type 1 Examination

Independent review confirms customer data is handled in safe, secure environment.

Atlanta, GA April 17, 2018 - Jemstep, a leading digital advice platform provider, is pleased to announce that it successfully completed a SOC 2[®] Type 1 examination for Jemstep Advisor Pro Digital Advice Platform Systems (Jemstep Advisor Pro). Conducted by PricewaterhouseCoopers, a leading professional services firm, this rigorous audit and certification attests to Jemstep's high security protocol and controls in place to secure customer data.

"At Jemstep, we pride ourselves on the reliability and security of the digital advice services we provide to our clients," said President and CEO Simon Roy. "Safeguarding customer data is of paramount importance to us and the successful completion of a SOC 2 Type 1 compliance audit is an affirmation of our commitment to security."

Roy added that Jemstep will now focus its efforts towards obtaining a SOC 2 Type 2 report to further validate its commitment to the highest quality security standards and enhance the trust our customers place on us.

Developed by the American Institute of Certified Public Accountants (AICPA), the SOC 2 is a widely recognized and trusted industry standard that provides service organizations independent validation about the design and operation of internal controls. The Type 1 audit looks at a point in time within the system that is in scope and illustrates the controls in place around it. With a focus on security, availability, processing integrity, confidentiality and privacy, this achieved certification assures financial institutions implementing Jemstep Advisor Pro that it maintains the tightest controls for data safety.

Jemstep Advisor Pro is an innovative technology that enhances the way advisors connect with their clients and prospects. It is a configurable white-label digital advice service that integrates seamlessly with a firm's website, mobile applications, custodian, trading, CRM, and other systems, helping a firm present an online client experience that aligns with its brand, value proposition and omni-channel delivery capabilities. Its open architecture allows home offices and advisors the flexibility to use their own asset allocation models or choose from a range of available asset allocation models curated by industry-leading investment managers.

Jemstep Advisor Pro's final SOC 2 Type 1 report is available upon request for Jemstep clients and potential clients under NDA.

About Jemstep

Jemstep is a leading digital advice platform provider. Established in 2008, it was one of the first digital platforms to focus on helping advisors deliver professional advice to their clients online. The award winning Jemstep Advisor Pro platform helps advisors scale their business efficiently by providing a full suite of highly flexible technology solutions that can be easily integrated into existing systems and business models. Invesco acquired Jemstep in January 2016.

About Invesco

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