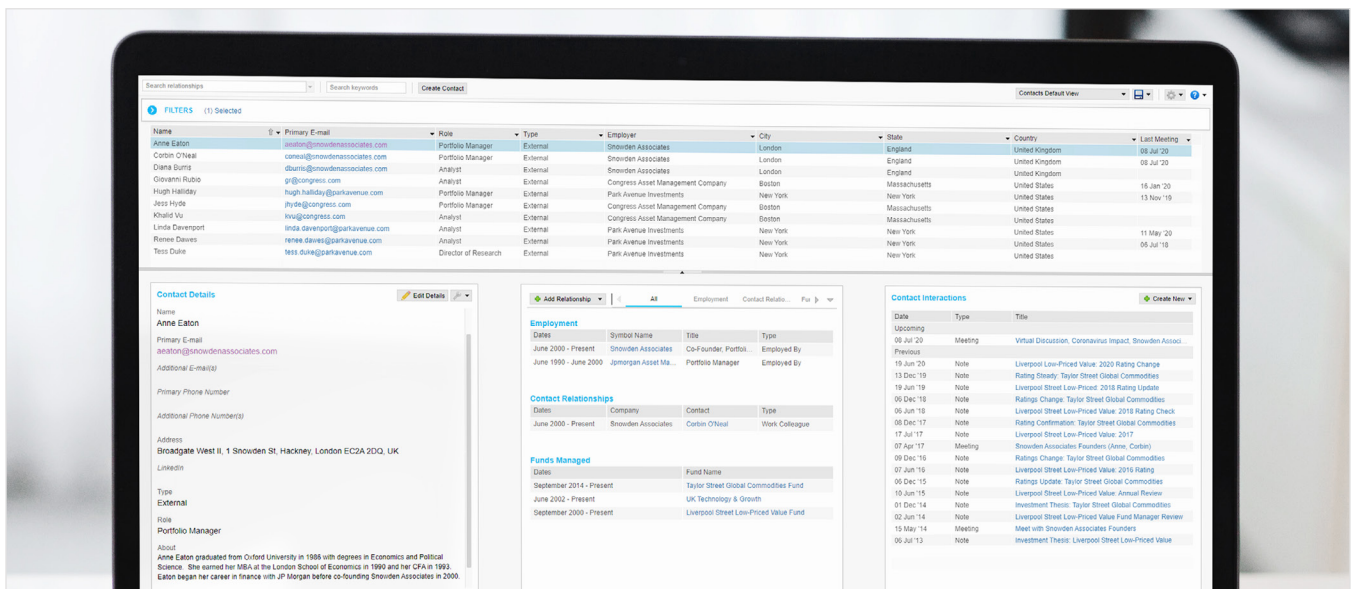


RESEARCH MANAGEMENT SOLUTIONS FOR ASSET ALLOCATORS

Gain a comprehensive, consolidated solution for research aggregation, manager on-boarding, on-going due diligence, and contact management.



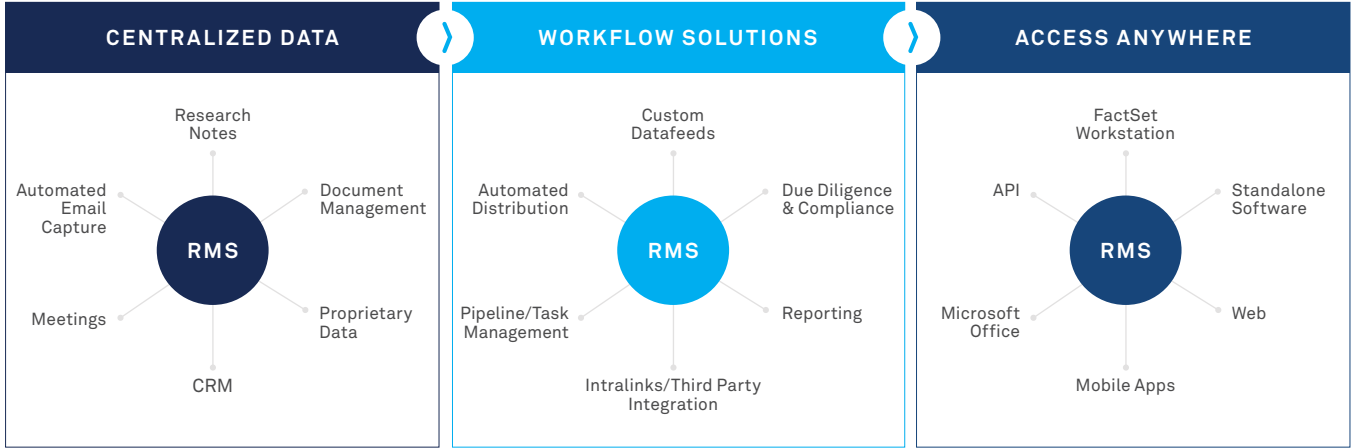
Leverage robust, flexible, and integrated contact management functionality that grows with your firm's evolving business needs.

CREATE A CENTRALIZED RESEARCH REPOSITORY

Aggregate research in a central location to quickly and easily store, retrieve, track, and share performance-improving ideas. Grant users the ability to tag notes and research to multiple entities while sharing information and ideas across teams to minimize duplicate work. Easily consolidate the information gained throughout various stages of your investment process including meetings and tasks, pitch books and manager bios, legal and financial documents, and due diligence reports into one centralized database. Leverage your indexed repository of proprietary information to make the best investment decisions with full transparency and accountability.

STREAMLINE YOUR INVESTMENT WORKFLOW

Integrate proprietary investment processes with customized fields, entry screens, and calculations. Automate the creation of alerts, tasks, and reminders based on stages of investments or specific triggers. Ensure that firms have completed the necessary tasks for each stage of a new investment, and that they have collected all the necessary legal and due diligence documentation, then make sure follow-up and analysis are performed regularly.



MANAGE MEETINGS AND CLIENT INTERACTIONS

Leverage robust, flexible, and integrated contact management functionality that will grow with your firm’s evolving business needs. Easily discover relationships between managers and track the history of individuals. Customize relationships between managers and contacts, and synchronize contacts to your email platform. Manage firm-wide and personal calendars to initiate follow-up reminders to help you maintain engagement. Generate pipeline and meeting reports detailing your firm’s communications, and measure the success of your team’s engagements with key contacts.

TAKE YOUR RESEARCH ON THE ROAD

Access, create, and collaborate on research using your mobile device. Submit research notes via email to quickly share ideas with colleagues, or access your research from any web browser to easily locate notes and custom reports. Safeguard your firm’s research with secure employee log-ins, sophisticated encryption, the ability to wipe lost and stolen devices, and more.

