

Cp Client Portal																							Ibr Investment Book of Record	
Ap Advisor Portal	Mo Mobility													Pm Performance Measurement	Gc CIPS Compliance	Caa Corporate Action Automation	Rmp Reconciliation to Multi-Party	Mac Multi-Asset Class Multi-Currency	Otp Onibus Trade Processing					
Op Operations Portal	Do Digital Onboarding													Rm Risk Measurement	Pc Performance Contribution	Aph Act. Performance History	Ht Historical Transactions	Tdr Trade Date Reporting	Tl Tax Lot Mgmt & Reporting					
Da Digital Advisor	Crm Client Relationship Mgt.	Fp Financial Planning	Dv Document Vault	Dw Digital Warehouse	Fdm Financial Data Model	Pid Pre-integrated Data	Ts Time Series	Dv Data Views	Dm Data Management	Aq Advanced Query	Sb InvestCloud Sandbox	Brp Benchmark-Relative Perf.	Ca Composite Analysis	Tcb Tree Composite Builder	Alt Alternatives	Mbc Multi-Base Currency	Bcm Brokerage/ Custodian Model							
Pcp Pre-Client Portal	Lg Lead Generation	Pi Pipes (Open CRM)	De Digital Engagement	Bu Become User	Cde Custom Data Extracts	Mv Multiple Views on Multiple Data	Sdv Saved Digital Views	Nm News Management	Rm Research Management	Vm Video Management	Cur Content Usage Reporting	Sa Smoothing Algorithms	Pme Public Market Equivalent	Gnp Gross & Net Perf. Calculations	Trm Trade Restriction Management	Ho Holdings As Reported	Sbr Shareholder Book of Record							
Rm Rebalance Management	Mm Model Management	Dr Drift Analysis	Dit Digital Investor Tracking	Rb Report Builder	Am Account Management	Pwp Programs Writing Programs	Pl InvestCloud PLACE	Sud Structured & Unstructured Data	Aas APIs for All Services	Sd Snowflake Deployment	Sa SDK & APIs	Irr Internal Rate of Returns	Bm Benchmark Management	Ipp Implied Private Premium	Arv Aggregated Risk View	Maw Multi-Account Workflows	Sw SWIFT							
Rpm Risk Profile Management	Ao Automated Account Opening	Sc Secure Chat	Iss Investor Self-Servicing	Na Notifications & Alerts	Pn Portfolio News	Sas Sales Activation System	Ome Order Mgmt Engine	Reb Rebalancer Engine	Rbe Report Builder Engine	Be Billing Engine	Pe Planning Engine	Ba British Attribution	Cc Configurable Character	Fi Formula Inspector	Clt Calculation Look-Through	Pma Portfolio Mgmt Accounting	Msd Multi-Source Data Acquisition							

Des Design	Dw Digital Warehouse	Sc Security Certificate	Ve Verisign	Vev Verisign Ev	Vt Virtual Token	Co Carry Over Security Cert.	Sdk SDK APISandbox	Cdr Custom DB	Dc Data Center	Ds Data Storage	Dos Document Storage
Ct Community Tech™	Spt Status & Progression Tech™	Apt Appointment Tech™	Smt Smart Tech™	Cvt Canvas Tech™	Bt Bar Tech™	Vt Voice Tech™	Act Activity Tech™	Pit Pipes Tech™	Sat Sales Tech™	Ia InvestCloud Asset™	

Better by design

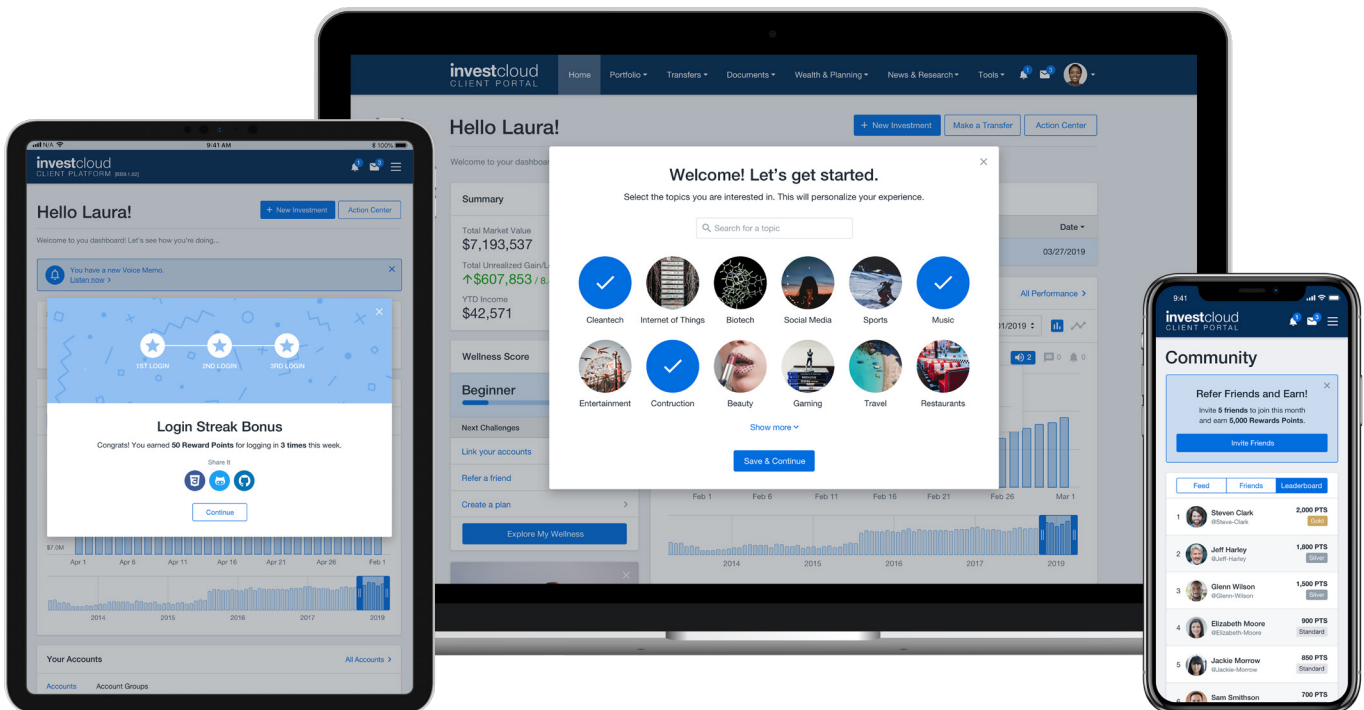
It comes as no surprise that in the 21st century, our lives are digital. Technology is enabling formerly complex systems and industries to become so much more functional. But where is this new wave of digital design thinking when it comes to financial systems? To date, financial systems have been plagued by “old think” – inflexible, inconsistent, inefficient and expensive to change – all resulting from monolithic, hard-coded applications.

It’s time for financial systems to embrace a “new think” approach – an approach rooted in simplicity, empathy, intuition and design created for flexibility and longevity.

Welcome to InvestCloud

Welcome to cloud-based, first class, integrated digital tools, apps and platforms for all investment managers. With a library of 300+ apps, the options for a custom digital experience are endless. We make apps that empower investors and managers to make better decisions. Apps that can function alone or be grouped and bundled for unique solutions. The result: over 7,000 unique digital experiences on our platform.

any place. any time. any device.
totally custom experience.



Simple by design

While the backend is hard at work, our user experiences are intuitive and simple. InvestCloud is easy to implement, easy to maintain and easy to upgrade. Clear. Designed. Precise.



Integrated Digital Warehouse

InvestCloud's Digital Warehouse is built to be the ultimate organised storage platform. Thousands of sources push and pull data, documents and media directly through one common interface – ensuring secure, accurate information at any time through the apps.



Build your own

InvestCloud's Innovation Centers provide access to mentors for designing and building entrepreneurial ventures from startups and existing businesses alike. Designed to foster extremely fast development.



Faster

Traditional programming is slow, labor intensive and difficult to update. With Programs Writing Programs (PWP), one designer or analyst can do the work of 50 programmers – faster, more accurate and sustainable.



Built secure

Security is at the heart of InvestCloud. Over 700 clients have entrusted us with over \$2 trillion in assets, which we manage with 10 levels of encryption. This is our business.

Unparalleled products for success

The cloud platform for financial apps



INVESTCLOUD BLUE

Digitising client communication, automation and management

- Client/Institutional Client Portal
- Digital Onboarding
- Client Relationship Mgmt (CRM)
- Advisor/Operations Portal
- Digital Advice
- Digital Engagement



INVESTCLOUD ORANGE

Digitising data into information – all in one place

- Digital Warehouse
- Engines
- Data Management
- Pre-Integrated Data
- Data Views
- Content Management
- SDK & APIs



INVESTCLOUD BLACK

Performance measurement, composites, attribution and risk

- Performance Measurement
- Composite Analytics
- GPS Compliance
- Attribution
- Risk Measurement
- Formula Inspector



INVESTCLOUD GREEN

Mass automation for trading and accounting – achieved by frictionless conversions

- Investment Book of Record
- Multi-Asset Class, Multi-Currency
- Corporate Action Automation
- Reconciliation to Multi-Party
- Acct. Performance History
- Omnibus Trade Processing

“Working with InvestCloud, we own our own IP. It’s our design and it’s based on the pillars that matter to us... and that’s just very different than anything I’ve ever seen.”

Brian Casey, CEO, Westwood Holdings Group, Inc.

“InvestCloud is 100x better at aggregating our data than we are.”

Steve Jenvey, VP/Director Architect & Strategy, Capital Group

“It’s about streamlining our processes and being efficient, all while maintaining that high level of service with a focus making sure that we’re producing accurate results for our clients.”

Jill Calton, Director of Operations, UMB Fund Services

Whether it’s an institutional firm, asset management firm, advisory firm or individual investor, we saw the potential with InvestCloud Green to offer a more robust and thorough solution to our client base.”

Gary Anetsberger, CEO, Millenium Trust



A digital platform for wealth management and turnkey asset management programs

InvestCloud White is formed around six key business practices, called “Centres”, each designed to empower advisors while providing them mass scale and efficiency. Each of the Centers is a thoughtfully designed combination of apps, grouping of dashboards, portals and industry leading functionality from all of our products: Blue, Orange, Black and Green.

learn more at www.investcloud.com

ABOUT INVESTCLOUD INC.

Headquartered in Los Angeles with a global presence, InvestCloud develops first-class, financial digital solutions, pre-integrated into the cloud. By empowering investors and managers with a single version of the integrated truth through its unique digital platform, InvestCloud creates beautifully designed client experiences and intuitive operations solutions using an ever-expanding library of digital modular apps. The result? Powerful products for individual investors and institutions alike, assembled on-demand to meet clients' specific needs.

Today the InvestCloud platform supports some of the largest banks in the world with substantial assets. In addition, for managers under \$40 billion, InvestCloud supports over \$2 trillion of assets across 700+ diverse clients – from wealth managers, institutional investors & institutional asset managers to family offices, asset services companies, financial platforms & banks.

investcloud.com

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