

## Equity Essentials Solution Set

A comprehensive set of accounting, reporting, and investor communication solutions, designed to supercharge growth

Being in growth mode comes with its own set of challenges. It should come with its own set of solutions too.

That's why Allvue created the Equity Essentials solution set – a comprehensive set of accounting, reporting, and investor communication solutions, designed to help private equity and venture capital firms solve for the varying challenges they face as their firms grow.

No matter what phase your firm is in, the Equity Essentials solution set will help you provide quality service to your clients via streamlined and scalable processes. Allvue will help you:

- Future-proof your back-office processes and workflows
- More efficiently meet maturing investor demands
- Leverage the same client portal and communications solutions used by industry titans

## A Solution Designed to Grow with You

### Core

An essential set of solutions needed to help firms get off the ground quickly

### Growth

A package designed to help firms with under \$1B of committed capital optimize for growth

### Select

A premium solution to help firms with over \$1B of committed capital streamline processes and reduce risk

# Why Allvue

Our back-office software solutions are built on top of Microsoft's enterprise framework

- This allows for a **turn-key implementation experience**
- Our software-as-a-service model **prevents costly upgrades** and creates a **highly secure and self-sufficient** experience
- **Our technology stays on the cutting edge** even as the cutting edge evolves

## Industry-leading solutions

- Access the same **comprehensive software** used by titans of the private equity and venture capital industries
- **Made accessible** to growth-mode firms via a progressive packaging model
- **Extensive standard reporting package** to help teams quickly provide quality investor communications

## Fully-integrated platform

- **Streamline workflows and reduce operational risks** by collaborating in one platform and working off a single source of data

# About Our Solutions

## Fund Accounting



A complete back-office solution that combines detailed financial statement reporting, a true general ledger, cash management, and workflow standards.

## Fund Performance & Portfolio Monitoring



Monitoring software that easily collects, manages, and reports on underlying companies and assets.

## Investor Relations



A CRM and investor access portal solution that integrates seamlessly with accounting and reporting modules while delivering crucial data to LPs.

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