SS&C E-INVESTOR™

STREAMLINE AND DIGITIZE YOUR INVESTOR EXPERIENCE

It's time to minimize document complexity and simplify your investor transactions. We can help. Our end-to-end processing platform automates the delivery, completion, submission and tracking of all investor transactions, starting with initial onboarding.

Efficient investor transaction document processing

Close capital more quickly: Minimize document complexity through the automation of business logic and ensure data completeness at the time of submission by streamlining the signature collection process.

Streamline review and approval: Use automated workflows to assign and manage documents through the review and approval process via customizable checklists by fund and document type.

Integrate with downstream or upstream systems: Avoid redundant data entry and reduce processing cycles.

Reduce risk: Eliminate paper-based processes and the resulting risk of errors, delays, and capacity constraints.

Trust in our proven solutions

No.1
largest hedge fund administrator worldwide

90
of the top 100 hedge funds trust us

$2T
assets under administration

47
countries serviced by our team

35
years of experience handling investments

Discover what we can do for you; visit **ssctech.com**

What we can do for you

- Automate the delivery, completion, submission and tracking of all investor transactions
- Detail activity tracking of your firm's prospecting efforts
- Enable the investor (or financial advisor) to complete the transaction document online, leveraging the platform's extensive and flexible data validation and dependency rules
- Build a dashboard module, which includes profiles on prospects and investors
- Deliver targeted marketing materials and subscription documents to potential investors
- Approve and digitally sign documents through a web browser

How we do it

- Management dashboards provide visibility into all in-progress or completed transactions which enable the identification of trends and issues and forecasts investment activity
- Build and maintain your prospect and investor profiles
- Generate and distribute investment packages with relevant fund documents
- Pre-populate documents using data maintained in the investor profile
- Collect data electronically that can be sent downstream to other applications
- Our technology allows easy access to a PDF-based view of electronic documents
- Ability to upload historic documentation through the support of scanned documents
- Seamlessly integrates with InvestorVision, an Intralinks product
- Can be integrated with a CRM (requires development to establish API connectivity)
- Supports multi-administrator investment manager structures (e.g., Fund A uses SS&C, Fund B uses Administrator B)

OUR EXPERTISE

SS&C offers a uniquely comprehensive service that supports our clients' long-term growth. As a globally trusted, publicly traded company, we are shaping the future of how the investment industry operates.