

Broadscope's Investor Portal Benefits

Dynamic Reporting

The Investor Portal provides dynamic drilldown and query functionality for quick access to current and historical investor and portfolio data. The query capabilities allow investors to access data for user defined date ranges. The drilldown and query capability significantly reduce the user's need to search through historical document libraries.

Easy Integration

Graphical and tabular reporting rendered in the Investor Portal can be easily downloaded to MS Excel and Adobe Acrobat for additional analysis and reporting.

Custom Design

The look and feel of the Investor Portal can be customized to appear as a seamless extension of our client's website.

Two-Way Communications

The Investor Portal allows for two-way communications defined by the client. Through the Portal, investors can notify Broadscope of changes to contact data and wire instructions that automatically kickoff review and approval workflows and database updates.

Impersonator Rights

Broadscope clients are provided with impersonator rights allowing access to a specific user's Investor Portal view.

One System / No Duplication

The Investor Portal draws data from the same system that houses fund and client data, merge templates and merge processes for investor communications. This greatly reduces the risk of posting errors because it eliminates the need for dual databases and special processes required by other web-based portal systems.

Data Warehouse

The Investor Portal incorporates a flexible data warehouse as its core. The data warehouse can be customized to store data from a variety of funds, including private equity and hedge funds, providing a complete web-based portal solution for clients with multiple business lines.

Costs

When all fees are considered, the Investor Portal is generally less expensive than hard-copy mailings and most other web-based portal systems.

Contact Us

If you want to free up time to focus on important strategic issues, please contact us.

We have a lot to offer.

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