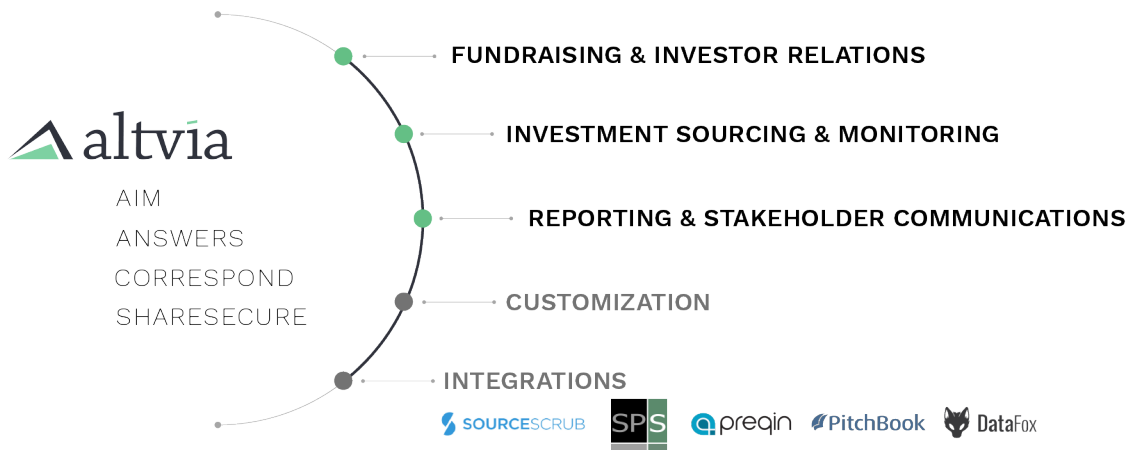




A HOLISTIC, INDUSTRY-SPECIFIC SOLUTION FOR ALTERNATIVE INVESTING

INTEGRATED TO POWER YOUR FIRM

Altvia supports and empowers your entire firm with a product suite developed from a proven process, atop Salesforce, that grants more control, accuracy, transparency, and quality than you've operated with before. Track relationships and data that drive capital raises and deployments. Create a high-touch investor experience with targeted emails and distribute documents securely to power your processes. Access beautiful dashboards, reports, and business intelligence tools that are accurate and refreshed on a timely basis. Altvia's tools are built for pipeline management, fundraising, and investor relations teams and provide a path to hundreds of integrations so you operate like a top-tier firm.



KEY BENEFITS



AIM, PRIVATE EQUITY CRM

Manage your relationships, interactions, opportunities, workflows, and data



SHARESECURE, LP PORTAL

Provide sensitive documents in a branded, secure virtual data portal



AIM EMAIL INTEGRATION

Seamlessly update contact information, notes, and conversations from Outlook and Gmail right to AIM



ANSWERS, BUSINESS INTELLIGENCE

Advanced data analytics built specifically for private equity to centralize data for a single-source of truth



CORRESPOND (MARKET EDITION)

Strengthen your network and build your pipeline with communications to power prospecting, fundraising, and more



CORRESPOND (INVESTOR EDITION)

Generate, distribute and track investor related documents to power and personalize your communications



OUR SOLUTION

Altvia translates data into intelligence. As a fully integrated Private Equity solution on the Salesforce platform, Altvia combines technology with a proven process to harness the institutional knowledge of your communications, LP portal and back-end systems. Successfully raise and deploy capital, ensure compliance and deliver a trusted and transparent experience to stakeholders with a tailored solution from Altvia.

"The benefits [of AIM] clearly outweighed any doubt – a Private Equity CRM solution built on one of the world's largest cloud platforms along with ubiquitous access 24x7x365 via any device. We made the change and never looked back."

-STEVE DARRINGTON, PARTNER AND CFO, PHOENIX EQUITY PARTNERS

WHY CHOOSE ALTVIA?

A HOLISTIC SYSTEM

Our software and services support internal and external teams and provide a path to hundreds of integrations to support client's business growth.

PREMIUM SERVICES

We have a team of experts, with decades of experience, who work with clients to support system adoption, change management, and unique business needs.

BUILT ON SALESFORCE

Altvia is a private equity solution, built on top of the #1 CRM platform in the world, Salesforce.

13

Years in
Business

2

Global Offices
(US and UK)

2,300+
Users

170+
Clients



See How Altvia Works

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