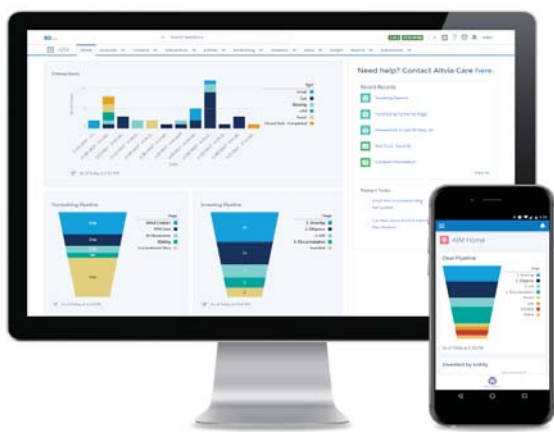


# ALTERNATIVE INVESTMENT MANAGEMENT (AIM)



*How do you manage and leverage your data for new insights to make better decisions?* Private Equity firms are now, more than ever, looking to cloud-based solutions to help answer this question and gain a competitive advantage.

At Altvia, we help you differentiate yourself in today's market by unleashing the power of your relationships and data. At the core is AIM – a flexible, fully integrated solution with over ten years of development that works the way Private Equity thinks. Based on the Salesforce platform, AIM enables you to consolidate your data into one central system for operational efficiency and optimize workflows to scale for growth. AIM is also *Lightning ready* with a clean and simple user interface designed for ease-of-use and speed. With AIM, you gain the foundation to build your firm-wide technology solution to harness the power of your data and give you an informational edge that puts you years ahead of your competition.

## BUSINESS SOLUTIONS

### CONTACT & ACTIVITY MANAGEMENT (CRM)

Manage your relationships, interactions, workflows, and data with a Private Equity CRM built on the Salesforce platform

### LIGHTNING READY

Gain ease-of-use and greater adoption of AIM with a simplified user interface designed for fast navigation, powerful data visualization, and personalization of your user experience

### FUNDRAISING AND INVESTOR RELATIONS

Track fundraising progress in detail, easily generate reports on fundraising progress, and proactively manage investor relationships

### DEAL FLOW AND FUND TRACKING

Capture critical information throughout all stages of the due diligence and investing process, and instantly generate reports on status and progress with a single click

### PORTFOLIO MANAGEMENT

Put information at partners' fingertips with reports and

dashboards capturing the portfolio of investments and current valuation information and critical metrics

### AIM INBOX POWERED BY ZYNBIT

View, edit and create data related to AIM without ever leaving your Microsoft Outlook inbox

### ALTVIA CORRESPOND PREMIUM EDITION

Communicate with your entire network, from prospect to investor, right inside of AIM to improve GP-LP transparency and grow relationships

### SHARESECURE

Provide LPs and stakeholders with an easy-to-use and secure portal to share a full spectrum of investment related documents and multimedia files

*"We have more accurate and more meaningful data, and we can do everything more real-time. I think we became a lot more efficient."*

– Adam Ciborowski, Vice President, Portfolio Management, RCP Advisors

## TECHNICAL FEATURES / CAPABILITIES

- Cloud-based solution that leverages Salesforce's global infrastructure
- Global data center footprint for speed, security and reliability
- Device agnostic; works across PC, Apple, iOS, Android, Blackberry
- Desktop integration for Microsoft Outlook and Excel
- Mobile application for easy access anytime, anywhere
- Purpose-built modules specific to Private Equity
- Integrated communications including mass emailing
- No database or hardware to maintain

## WHY CHOOSE ALTIVIA?

- **Global Availability:** With AIM, built on the Salesforce Platform™, you can take advantage of global availability and implementation capability.
- **Trusted Provider:** You gain a partner with over ten years of industry experience helping Private Equity customers spanning six continents.



*The Altvia Care team provides a full range of professional services backed by a dedicated team of business and technology experts who guide you through on-boarding and partner with you to optimize your customer journey and ROI.*

- **Proven Technology:** Altvia's 100% 5-star product rating and partnership with Salesforce since 2008 provide you with a proven infrastructure and best of breed solutions.
- **Altvia Care:** You get the best of both worlds - comprehensive support for your Altvia solution and access to a consulting team that rivals the best technology consulting firms out there.
- **Flexibility and Scalability:** Our flexible solutions provide you with a customized user experience that's easy to adopt, economical to implement and evolves over time to scale with your growth.

**Visit [altvia.com](http://altvia.com) to request a personalized demo and see a list of customers currently using our solutions.**