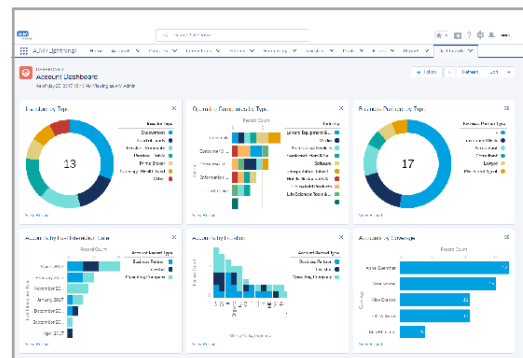




ALTERNATIVE INVESTMENT MANAGEMENT (AIM)

A HOLISTIC, INDUSTRY-SPECIFIC SOLUTION

Differentiate yourself in today's market by unleashing the power of your relationships and data. AIM, purpose-built on the Salesforce platform, is a fully integrated solution, enabling you to consolidate your data into one central system for operational efficiency — optimizing workflows to scale for growth. AIM is also Lightning ready with a simple user interface designed for ease-of-use and speed. You gain the foundation to build your firm-wide technology and give you an informational edge that puts you years ahead of your competition.



KEY BENEFITS



PRIVATE EQUITY CRM

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



INVESTOR RELATIONS

Proactively manage investor relationships with transparent communication



LIGHTNING READY

Simplified user interface designed for fast navigation, powerful data visualization, and personalization



DEAL FLOW AND FUND TRACKING

Capture critical information throughout the due diligence and investing process



FUNDRAISING MANAGEMENT

Track fundraising progress in detail and easily generate reports and dashboards



PORTFOLIO MANAGEMENT

Put information at partners' fingertips with detail reports and dashboards



OUR SOLUTION

AIM offers a solution to not only track people, organizations and related communications, but also each stage of due diligence and the investing process. Portfolio management is easier with current valuation information, portfolio of investments views and critical metrics instantly available. Grow your investor relationships with a fully integrated end-to-end solution for your entire network.

"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

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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