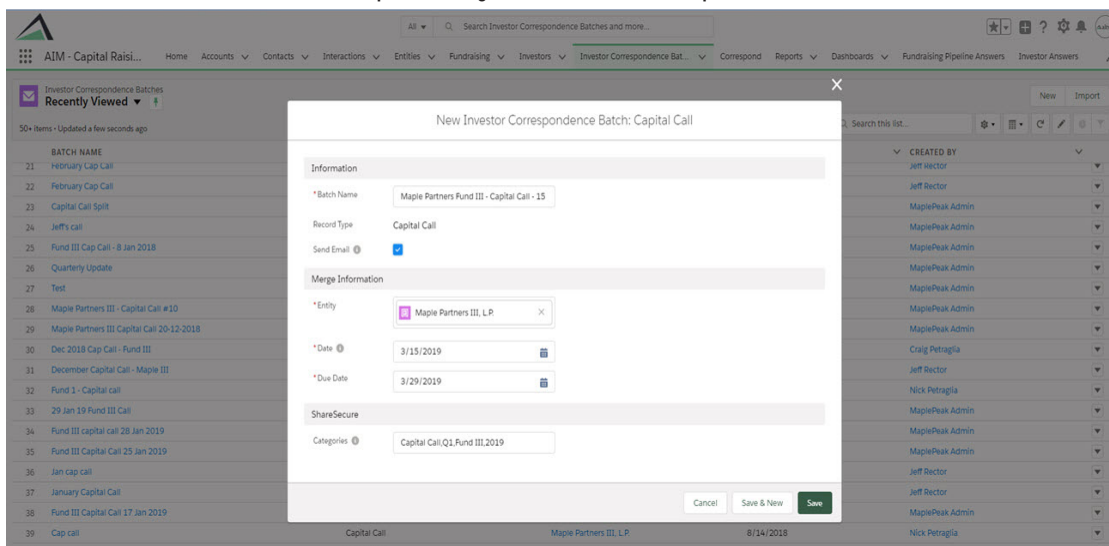


ALTVIA CORRESPOND (INVESTOR EDITION)

A SECURE, INTEGRATED DOCUMENT SHARING SOLUTION

With increasing demands for more transparency, fund managers and institutional investors are challenged with the best way to capture, report and share information. The problem is further compounded because data comes from various locations including a CRM, front office activities and legacy accounting systems. Altvia Correspond Investor Edition bridges the gap: organizing information to share quickly and easily. Use the solution to distribute and generate personalized capital call notices, distribution notices, K1s, quarterly and annual reports and more.



KEY BENEFITS



FULLY INTEGRATED

Generate documents and deliveries without ever leaving AIM



FILE SPLITTING

Integrate and prepare your investor specific documents within seconds



TRACK COMMUNICATION PREFERENCES

Distribute documents to the right investors at the right time with a thoughtful tracking of preferences



PERSONALIZED DOCUMENTS AND EMAILS

Create unique investor documents and templates to comply with side letter agreements



EASY ALLOCATIONS

Calculate capital call allocations and distributions right within your browser



DATA ROOM INTEGRATION

Post documents to ShareSecure for investors to easily and securely access



OUR SOLUTION

Altvia Correspond (Investor Edition) enables you to easily generate, distribute and track investor related documents to provide visibility into performance and build greater confidence about investment decisions. Efficiently integrate with your back-office systems and generate personalized communications, securely and promptly. Deliver these documents through email or Altvia's investor portal, ShareSecure, with just a click of a button.

"Our market is so relationship driven—we really get to know our business partners and understand their needs. With Altvia, it's clear that they value having a relationship that comes along with the software."

– MICHAEL PAINTER, MANAGING PARTNER, PLEXUS CAPITAL

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

800.914.9120 | info@altvia.com | Altvia.com