

Mistakes to Avoid When Choosing Your Next Investor Portal

Limited partners (LPs) today expect transparency and on-demand data and reports from fund managers. Your investor portal needs to deliver the data they need in a simple, secure interface with robust reporting features built-in. The wrong solution could cost you far more than you realize.

Avoid these four common missteps when choosing your investor portal.

01 Reporting

Communicating with investors needs to be fast and accurate. To ensure your reporting platform is up to snuff, be sure **NOT** to:



Choose an inefficient reporting platform



Dismiss security concerns



Overlook requirements for standardization



Ignore clunky UIs and UX that are cumbersome for users

SS&C Intralinks InvestorVision™ allows you to:



Streamline your firm's reporting process



Upload information and manage investors across funds



Quickly access and track data across multiple funds



View automatic audit trails

02

Standardization

Industry standards ensure reports uniformly deliver information in a transparent way. The wrong solution could mean:



ILPA templates are not available



Static documents that fall short of investor expectations



Reporting that doesn't meet industry standards and best practices



Inability for the LP to track, manage and analyze investments across funds

InvestorVision is helping to drive standardization in the industry by:



Including ILPA templates embedded directly in the platform



Helping GPs build and maintain solid relationships with their LPs, encouraging investment in new funds



Allowing LPs to easily manage data across their funds

03

Security

Today, world-class security around sensitive investment data is essential. The wrong solution could:



Leave you vulnerable to cyberattacks and ransomware, which can ruin your business and reputation



Drive users to rely on less secure methods, like email, to avoid a complex interface

InvestorVision delivers:



Bank-grade security features that prevent catastrophic errors, breaches and devastating reputational risk



Secure access to investor-specific reports and an automatic audit trail

04

Ease of Use

If a technology isn't simple to use, users will avoid it. The wrong solution could deter investors when:



The interface is confusing



Tech support is unavailable outside business hours



Multiple logins are required, costing users time and patience as they toggle between accounts

InvestorVision is easy to use, offering:



A modern interface and intuitive dashboard for managing communication with all investors from one place



24/7/365 award-winning support to keep you up and running



A single login that allows LPs to see investment data across funds



Customized homepage branding within the portal

About SS&C Intralinks

SS&C Intralinks is the pioneer of the virtual data room, enabling and securing the flow of information by facilitating M&A, capital raising and investor reporting. SS&C Intralinks has earned the trust and business of many of the Fortune 1000 and has executed over USD 34.7 trillion worth of financial transactions on its platform.

For more information, visit intralinks.com

Learn more about **Investor**Vision
from SS&C Intralinks in our eBook,
What to Look for in Your Next
Investor Portal.

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