SS&C Intralinks FundCentre™ Onboarding

Close funds faster with an automated investor onboarding experience

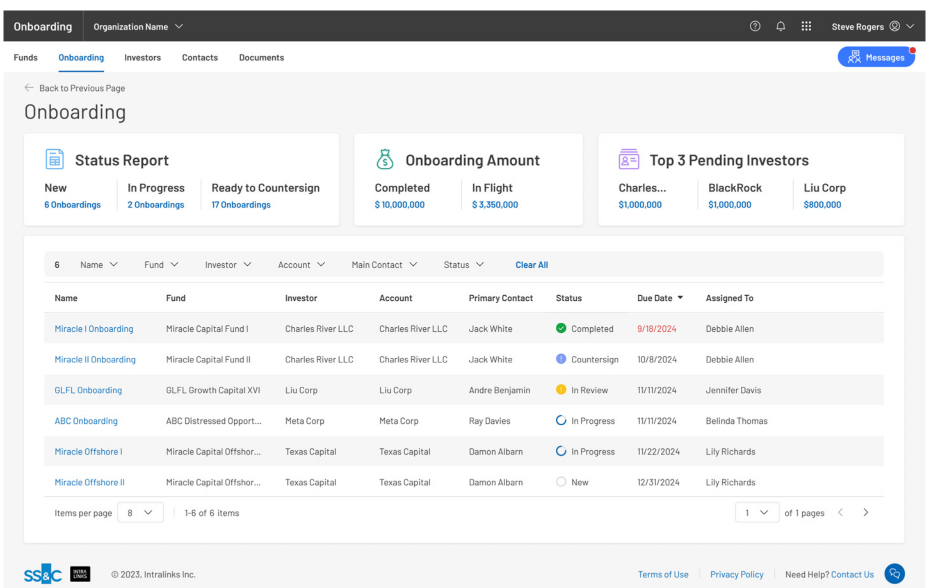
The success of your fundraising efforts hinges on one critical factor: capital isn't truly raised until investors are fully onboarded. Once your fundraise is complete, the speed of investor onboarding determines how quickly you can put that capital to work. With SS&C Intralinks FundCentre™ Onboarding, you can accelerate the fundraising process and eliminate the hassle of chasing documents. Our intuitive platform for fund managers streamlines the fund subscription process, ensuring transparency, efficiency, scalability and regulatory compliance for fund managers.

Integrates with FundCentre platform

Single sign-on across GPs

Bankgrade ISO 27701 security

Streamline investor onboarding while delivering an exceptional user experience:



- **Save time and resources:** Automatically generate and deliver fund subscription packages to investors
- **Close capital faster:** Accelerate funding cycle times with automated business logic, enabling investors to complete the process quickly and effortlessly
- **Boost pipeline transparency:** Track document status and monitor investor progress in real-time, making it easy to identify and address outstanding action items

Smart features to help you finalize contracts and keep your fund on track

Customized rules builder

- Create custom supporting document requirements for all LP types, jurisdictions and risk ratings

Investor profiles

- Collect investor data once and reuse it across multiple documents
- Dynamic screens minimize manual input for investors

KYC/AML Compliance

- Collect the data necessary to meet regulatory requirements
- Track beneficiaries, controlling persons and close associates

In-app messaging, comments and notifications

- Communicate directly with LPs
- Send notifications and add comments to request missing information

E-Sign and Countersign

- Enables you and your investors to view, approve and digitally sign documents

APIs

- Easily integrates with FundCentre™, any CRM including Salesforce, DealCloud, Dynamo, HubSpot, and other systems for a seamless flow of information across platform

Flexible workflows

- Create distinct GP and LP workflows to ensure complete data collection

Intelligent design

- User-friendly interface reduces the back-and-forth with LPs
- Easy access to live document status updates
- Scalable technology that grows with your firm

Join the largest community of GPs and LPs on the world's leading alternatives platform.

More than $1 out of every $2

raised globally for the private equity industry is done on our platform

515,000 LPs

from over 100,000 organizations use our fund reporting portal

Ready to elevate your investor onboarding process?

Contact our team for a demo: Intralinks.com/contact/