# Addepar Evaluation Guide

7-13 WEEK TIMELINE

Addepar What you can expect from us.

01. PRODUCT MATERIALS AND DEMO

Overview of Addepar solution and impact

03. SOLUTION PROPOSAL

Present comprehensive solution tailored to your needs

04. SOLUTION ALIGNMENT

Address technical concerns and outstanding questions

Formal discussion on service coverage and pricing

06. STATEMENT OF WORK &

PRICING DISCUSSION

07. EVALUATION CHECKLIST

Check progress and manage timeline

09. CONTRACT

Legal review and deliver contract

10. IMPLEMENTATION PLANNING

Internal alignment and implementation planning

DISCOVER 1 WEEK

VALIDATE 2 – 8 WEEKS **PROPOSAL** 2 WEEKS

**APPROVAL** 2 WEEKS



Your Firm What we will need from you.

02. CLIENT PROFILE QUESTIONNAIRE

**d** Questionnaire

Complete the Client Profile

05. SOLUTION EVALUATION

Access and confirm solution presented meets the needs

08. PROPOSAL **EVALUATION** 

Evaluate price relative to value, agree commercials, and confirm timeline

11. REVIEW & APPROVAL

Review and sign contract, confirm internal team resource, and engage with Addepar implementation team

## Key Questions to Consider

#### **DISCOVER**

What are my goals?

Why do I need a solution now?

What's my timeline?

Are stakeholders aware of the problems?

Are stakeholders onboard with making a change?

Do I have the time and bandwidth to implement a new technology?

#### **VALIDATE**

Do my custodian(s) connect with Addepar?

What historical information will be required to transfer?

Can Addepar map my nested entities with ownership changes?

Does Addepar integrate with the tools I need?

Will I run billing through Addepar?

Do I need multi-currency support?

Can Addepar support both marketable & direct assets?

Has full discovery been completed including any gaps in the Client Portfolio Questionnaire?

### **PROPOSAL**

Is the pricing clear?

Any additional fees that I may not be aware of?

Have I involved all stakeholders?

Do I have contractual obligations with other providers?

What types of services do I need?

Does the implementation timing work for me?

Is there an internal committee I need approval from?

#### **APPROVAL**

Did all my stakeholders review and agree on the contract?

Do I have internal resources to support the implementation process?

How long will I run Addepar in parallel with my existing vendor?

What are my expectations for a successful implementation?

Have I aligned my expectations with Addepar?

What trainings does my team need?