Your evaluation journey

Client Discovery
Discover client pain points and product needs

Solution Proposal
Present comprehensive solution tailored to your needs

SOW & Pricing Discussion
Formal discussion on service coverage and pricing

Contract
Legal review and contract

Customized Product Demo
Overview of Addepar solution and impact

Solution Alignment
Address technical concerns and outstanding questions

Evaluation Checklist
Check progress and manage milestones

Implementation Planning
Internal alignment and implementation planning

DISCOVER
(1–2 weeks)

VALIDATE
(2–3 weeks)

PROPOSAL
(1–2 weeks)

APPROVAL
(1 week)

SFO

Client Profile Questionnaire
Complete the Client Profile Questionnaire

Solution Evaluation
Access and confirm solution presented meets the needs
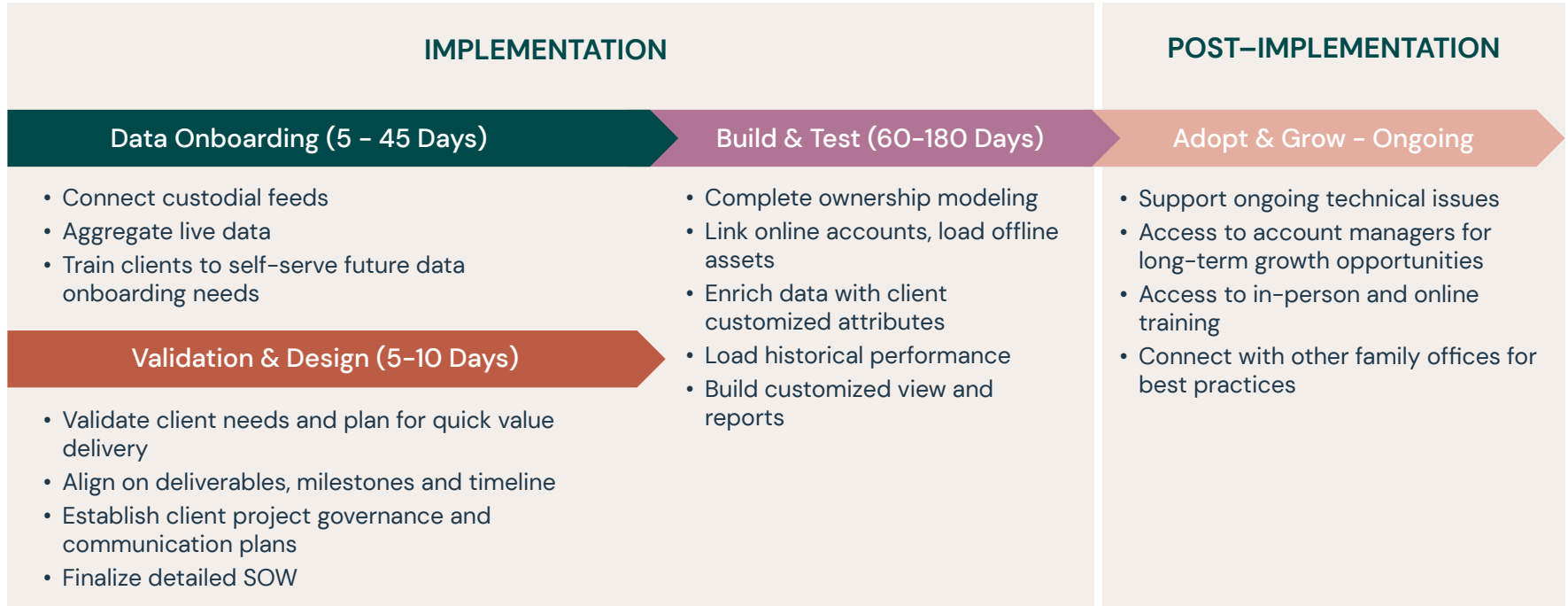
Proposal Evaluation
Evaluate price relative to value, agree commercials, and confirm timeline

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

ADDEPAR

Your journey to success

IMPLEMENTATION	POST–IMPLEMENTATION

Data Onboarding (5 – 45 Days)

- Connect custodial feeds
- Aggregate live data
- Train clients to self-serve future data onboarding needs

Validation & Design (5-10 Days)

- Validate client needs and plan for quick value delivery
- Align on deliverables, milestones and timeline
- Establish client project governance and communication plans
- Finalize detailed SOW

Build & Test (60-180 Days)

- Complete ownership modeling
- Link online accounts, load offline assets
- Enrich data with client customized attributes
- Load historical performance
- Build customized view and reports

Adopt & Grow - Ongoing

- Support ongoing technical issues
- Access to account managers for long-term growth opportunities
- Access to in-person and online training
- Connect with other family offices for best practices

Data Onboarding Specialist & Solutions Consultant

DataOps, Support Analyst, Client Success Manager, Account Manager