

01 Initial set-up

02 Data feed

03

Data upload

Set up

We set up your Microsoft servers and create logins, upload your logo, asset tree, investment guidelines and strategies in the system.

Connection to Custodian

Your dedicated onboarding team opens the connections to your custodian banks.

2-3 weeks

Portfolio Data

We upload your portfolio historical data in the system from an Excel template.

2-3 days

06 Success

05 Kick-off

04 Data upload

Customer Success Team

Each client has a dedicated point of contact within our customer success team. Your satisfaction will be regularly assessed

User Training

We provide the necessary training online for all users of the application.

Average onboarding duration:

4-5 weeks

Client Data Migration

We provide the support to upload your client meta data in the system from an Excel template.

2-3 days

