

Growing Multi-Family Office recharges technology operations with Linedata's cloud-based, integrated portfolio management AMP platform

Highly integrated, automated and auditable solution leverages MFO's technology, process and expertise to drive scale and efficiency

Our client is a North American Multi-Family Office investment firm with over USD \$20 billion in AUM. They provide discretionary investment management services and customized solutions to prominent families, foundations and global institutions. After a highly competitive selection process, the close working partnership between our teams produced a holistic, multi-asset, front-to-back solution aligned with the firm's strategic goals to integrate data and streamline and automate processes across multiple functional areas. Electing to host their operations in the cloud will speed time to market of new features and products and allows our client to focus on innovation to drive growth across the business.



“Highly integrated, automated and auditable workflows are critical for our daily business. Our teams also need immediate access to holistic views of clients’ investments across all assets. The Linedata team shared a customized demo environment that allowed us to validate the platform’s flexibility, robustness and openness in meeting our specific needs.”

**Partner and Portfolio Manager,
Multi-Family Office with \$20B
AUM**

Linedata AMP: Data integration, streamlined processes and workflows delivers improved user experience for the client and their end investors.

Given the complex investment profile of wealthy families, Multi-Family Offices such as our client face significant challenges maintaining an efficient operating model to manage portfolios, conduct compliance, execute and confirm trades, and provide reporting. Reliance on multiple data access areas, manual data entry and manual processes that support clients’ investment activities can reduce trading efficiency and impact client service.

Linedata’s extensible Asset Management Platform – AMP for portfolio and order management, data APIs and the ability to integrate across all assets in their system gave our client confidence that their new technology solution would meet key objectives:

- Provide streamlined cash forecasting, cash and liquidity management
- Enable holistic views of clients’ holdings across disparate sets of data from multiple sources
- Support publicly traded assets natively in their accounting book of records
- Enhance reconciliation processes for quick, accurate, start-of-day positions, pricing, and valuations

Linedata Cloud Hosting

Linedata was a pioneer in hosting 20 years ago and today works closely with clients to help determine the most appropriate cloud solutions aligned with each client’s internal strategy. At Linedata, this includes public, hybrid and private cloud infrastructure including on premise options. This allows clients like this Multi-Family Office to adopt new features more quickly and with ease, and supports better integrations, performance and scalability.



“Functions that took months to complete can now be completed in minutes.”



"Choosing to host our solution in the cloud will free our IT team to focus on data integration and data management rather than systems administration."

A growing partnership

While Linedata AMP's cloud enabled flexibility, robust functionality and ease of use are all key selling points, our client comments that, "beyond the feature differentiators, the Linedata team's willingness to engage in a detailed pre-implementation phase helped both sides gain confidence in the chances of success".

"The sales engineer's technical ability, knowledge of the system and thoughtful consideration of the specific use cases we were focused on made all the difference."

Linedata Asset Management Platform - AMP

Whether you're an institutional or a wealth manager, Linedata's innovative Asset Management Platform – AMP – delivers all your business needs on a single platform to adapt nimbly to our changing world.

Cloud-enabled software, collaborative expertise with integrated data and analytics, and the flexibility of our modular design enables better decision-making, streamlines processes, and empowers scale and innovation. A host of special features, such as an intuitive trading user interface and web-based model management delivers value and drives growth, so you can reimagine your business and respond to any challenge.

With over 20 years' experience, Linedata delivers humanized technology that empowers leading asset management and credit industry firms worldwide to evolve and operate at the highest levels.

Visit www.linedata.com/amp for more information

To speak with us or book a demo, please contact getinfo@linedata.com