



Recharge Your Technology with Linedata's Cloud-based, Integrated Portfolio Management Platform

Given the complex investment profile of Multi-Family Office clients, you face mounting pressures running efficient operations to manage portfolios, conduct compliance, execute trades, and deliver reporting. Challenges managing data across functions, and manual processing throughout investment operations amplifies risk and impacts client service.

Enhance your reputation as a trusted client partner and give your business the edge to drive growth with Linedata AMP for Multi-Family Offices.

Why Linedata

- We're global asset management technology experts. It's all we do. For over two decades we've tried and tested resilient solutions that focus on what our clients need in markets that are constantly changing
- We're independent — our only agenda is to serve your needs better
- We understand Multi-Family Office technology and business models, solving digital challenges pragmatically and effectively
- Our highly experienced technologists and experts work with you as trusted partners. We're there when you need us

What clients say about us

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

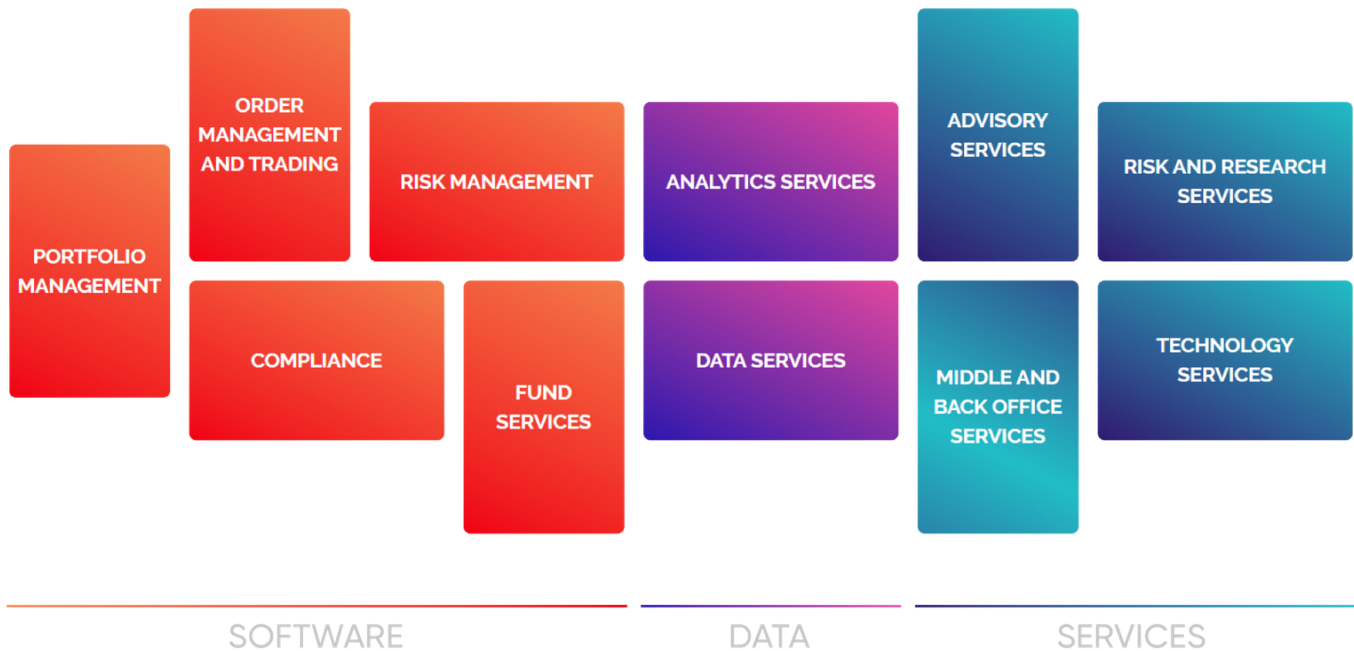
Technical ability, knowledge of the system and thoughtful consideration of our specific use cases made all the difference.

Partner, US Multi-Family Office, \$28B

Linedata is a proven platform, unlike many new entrants that wow with their UX, but lack key functionality needed to operate in our complex operational environment.

COO, North American Family Office \$100B AUM

The Multi-Family Office platform for adaptable growth



How your business benefits

Business outcomes and features

- Holistic views of client holdings – private investments, hedge funds, mutual funds, equities, futures, options, swaps, real estate
- Near real-time cash forecasting and liquidity management
- Tax lot appraisal views and trading, harvesting
- Supplemental general ledger and shadow accounting
- Efficient hosted solution with strong data integration capabilities to Investran accounting, proprietary databases, custody and brokerage systems
- Linedata Data Management Service for integrated alternative and ESG data solutions
- IT infrastructure management services, cybersecurity and cloud consulting

Gain a competitive edge

- Increase efficiency and reduce risk with streamlined front-to-back workflows
- Demonstrate transparency and audit capabilities to clients and regulators
- Adapt to evolving opportunities with a future-proofed technology solution and modular design
- Enhance transparency and reduce total cost of ownership by leveraging integrated data

Contacts

Visit linedata.com/AMP for more information

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