# Integrating Multiple Systems

Investment managers rely on a variety of software systems for their operational processes, but those systems can be difficult and costly to integrate.

Here are three challenges associated with integrating multiple systems, and how Clearwater can help:

<table>
<thead>
<tr>
<th>Challenges</th>
<th>The Clearwater Way</th>
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</thead>
<tbody>
<tr>
<td><strong>Narrowly Focused Systems</strong></td>
<td><strong>Consolidation of Key Systems</strong>&lt;br&gt;Clearwater consolidates many systems and tasks that investment managers have traditionally had to manually integrate, including accounting, reconciliation, data validation, custodial aggregation, post-trade compliance, and others (see back page for more information).</td>
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<tr>
<td><strong>Integration of Outside Data Sources</strong></td>
<td><strong>Fully-Managed Data Connections</strong>&lt;br&gt;Clearwater’s robust solution includes established connections to hundreds of custodians, data vendors, index providers, and other outside sources. These connections are monitored and maintained daily as a part of Clearwater’s reconciliation and data validation process.</td>
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<td><strong>Manual Intervention</strong></td>
<td><strong>Seamless Integration</strong>&lt;br&gt;Clearwater automates and consolidates key systems and processes. Where integration is necessary, Clearwater establishes, automates, and monitors connections to other systems under one set of daily reconciled and validated data, with no work required from end-users.</td>
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Clearwater’s Consolidated System

- Data aggregation
- Reconciliation
- Accounting
- Performance Calculation in Accordance with GIPS
- Billing
- Post Trade Compliance
- Composites
- Client Portal
- Statement Generator

... and others

The Clearwater system has effectively standardized the delivery of accounting data, portfolio performance, and investment policy compliance for our firm.

Lou Martine
Head of Distribution
U.S. Bancorp Asset Management, Inc.

Clearwater Analytics® is the leading provider of web-based investment portfolio accounting, reporting, and reconciliation services for investment managers, corporate treasuries, and insurance companies. Clearwater aggregates, reconciles, and reports on more than $1.5 trillion in assets across 25,000+ accounts daily. For more than a decade, Clearwater has partnered with investment managers of all sizes, allowing them to focus on their core business and grow their firms. Clearwater best-in-class technology and service allows our partner firms to capitalize on new opportunities, strengthen their existing client relationships, and streamline their internal processes. Clearwater is committed to continuous improvement and encourages firms to rethink how they approach their operational challenges.

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