canoe
canoeintelligence.com

Canoe Pro

CANOE SERVICES & SOLUTIONS POWERED
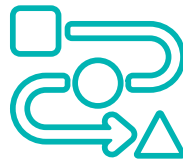BY TRUSTED PARTNERS

Canoe solutions expertly managed by trusted partners.

With Canoe Pro, you get industry-leading alternative investment technology with expert partner support, delivering a unified, comprehensive experience.

Canoe Certified Service Partners:
The Canoe Pro Partner Network is comprised of carefully selected partners who are well-versed in the intricacies of alternative asset administration, as well as operating Canoe and other technology platforms.

Alternatives Data Workflow Management:
Canoe Pro Partners accelerate the implementation, onboarding, and operation of a comprehensive alternatives data management program.

Streamlined Sales Process:
Procurement is handled exclusively by Canoe leading to an expedited time-to-value as it reduces the friction of contracting through multiple entities.

How Canoe Pro works:

Canoe Pro offers two complete packages, designed to address your most immediate needs.

CANOE PRO SERVICES

A bundle of Canoe Connect, Canoe Intelligence, and the following seven managed services:

IMPLEMENTATION PROJECT MANAGEMENT to streamline client onboarding to the Canoe platform.

CANOE PLATFORM MAINTENANCE that includes platform administration, entity management, and document uploads.

COMPREHENSIVE OFFLINE DATA RETRIEVAL ensures vital invest-ment docs can be successfully retrieved from various sources.

ENHANCED EXCEPTION REPORTING to continuously monitor expected documents, providing monthly status reports to clients and stakeholders.

EXCEPTION TROUBLESHOOTING AND RESOLUTION to take immediate action on resolving data discrepancies.

DATA VERIFICATION that confirms data and document upload accuracy, reconciling Canoe data with downstream systems.

DOWNSTREAM DATA DELIVERY ensures timely document and data uploads to designated downstream systems.

CANOE PRO TECH

Complimentary technology solutions for Canoe Connect and Canoe Intelligence:

SEAMLESSLY MANAGE your business critical workflows with tech solutions that complement your current tech stack.

AUTOMATED DATA VALIDATION ensures your data is accurate before it's delivered to your downstream systems.

ENHANCED INTEGRATIONS will seamlessly blend with your established workflow for a streamlined Canoe experience.

DATA ENRICHMENT provides additional context and checks to your alternatives data to improve its quality and accuracy.

MANAGE DATA from multiple sources quickly and easily.

Which Canoe Pro offering is right for me?

CANOE PRO SERVICES

Canoe Pro Services is ideal for **single family offices, wealth managers, and institutions like endowments and foundations,** who would like to augment their operations team with an outsourced service provider who can help operate their Canoe platform.

CANOE PRO TECH

Canoe Pro Tech is ideal for **firms with complex workflows** and want to implement complimentary tech solutions to use alongside Canoe to optimize their processes.

Contact a member of our team today to learn more:

GET IN TOUCH