

CANOE INTELLIGENCE

# Automated Alts Document & Data Management for Wealth Managers

# Alternative investment intelligence for Wealth Managers.

**WHILE DOCUMENT AND DATA MANAGEMENT IS VITAL, IT DOES NOT DRIVE SCALE, BOOST PERFORMANCE, OR DIFFERENTIATE YOUR FIRM.** Automating these tasks does. With Canoe, you can separate your firm from the rest and immediately drive client value. Free your team from alternatives document collection, data extraction, and data delivery. Gain deeper access to data. Generate investment insights with more confidence.

325+ alternative investors are fortifying their firms with Canoe.

By introducing automation alternatives document collection and data management workflows, wealth managers, multi-family offices, and single-family offices are seeing dramatic improvements in data accuracy and access, team efficiency, and client satisfaction.



**ROI ON TIME SPENT COLLECTING DOCUMENTS**  
from 18 hours to 1 hour per month



**CONNECTIONS UPSTREAM AND DOWNSTREAM**  
to ease document collection, data reporting, and analytics workflows

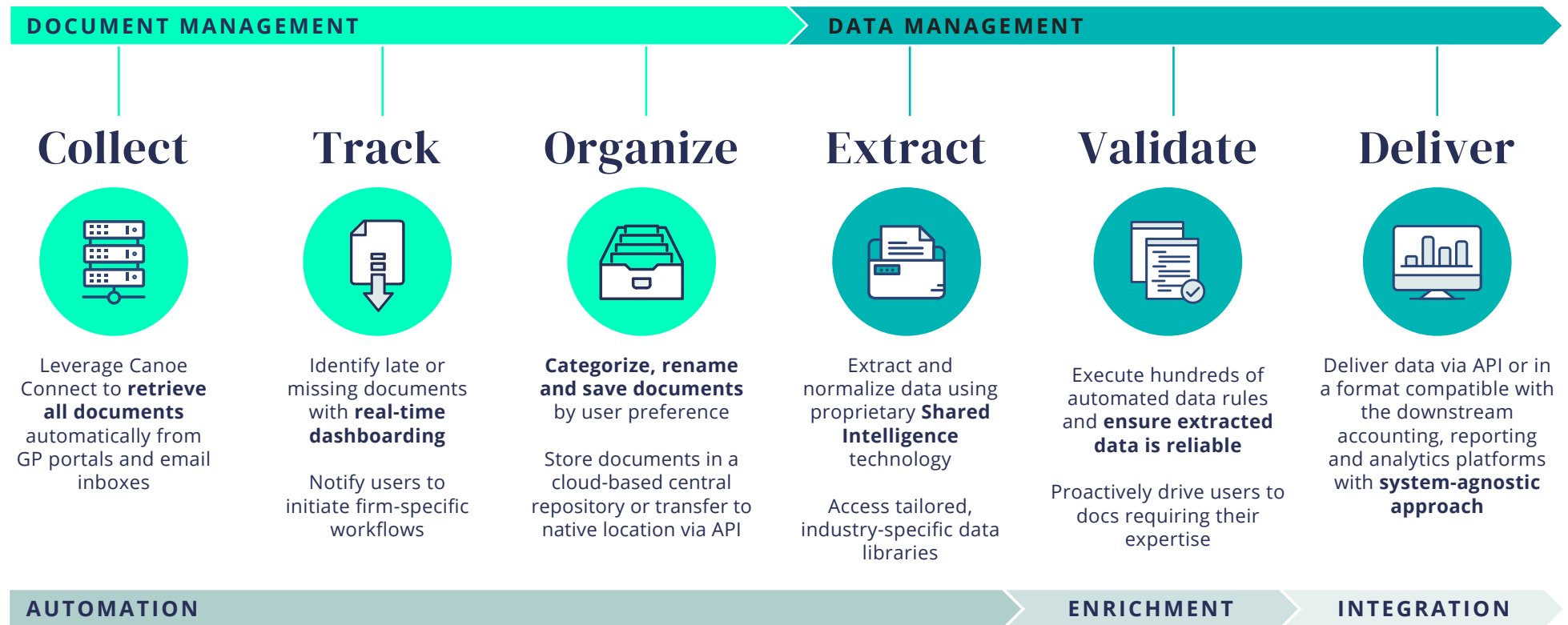


**INCREASE IN THE NUMBER OF FUNDS PROCESSED**  
by each employee

# How does Canoe work for Wealth Managers?

Canoe automates the collection and categorization of alternative investment documents from 500+ GP and administrator portals, extracts and validates the relevant data elements from those documents using shared intelligence from 42,000+ funds, and ultimately delivers clean, actionable data to our clients' downstream systems.

## The Workflow: Alternatives Documents Become Actionable Data Insights



# Why leading Wealth Managers choose Canoe.

Achieve Operational Efficiency. Serve Clients More Confidently. Scale Business Growth.



## ELIMINATED MANUAL WORKFLOWS

Automating your alts data workflows streamlines operational processes, reducing the complexity of managing diverse portfolios of alternative assets. With Canoe, you can implement centralized repositories and automated document organization to simplify asset management operations.



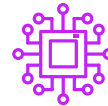
## BACKED BY INNOVATORS

From clients to investors to partners, our network is full of industry changemakers who are united in advancing the state of alternative investments and trust Canoe to power the evolution.



## UNPARALLELED TRANSPARENCY

Automation provides real-time access to financial statements and investment data, enhancing transparency and reducing the time needed to manually retrieve the information. With automated data extraction, you can ensure that all relevant data points are consistently collected, reducing the risk of missing critical information.



## SHARED INTELLIGENCE

When clients use Canoe to automate their alternatives data management, they are actively contributing to a stronger and more connected industry. The data within every new fund document introduced is mapped, speeding onboarding and improving data extraction accuracy.

Automate your alternatives document and data work with Canoe.

SEE CANOE IN ACTION