

"TECHNOLOGY BUILT TO SUPPORT OUR SPECIALIZED APPROACH"

As a leader in the independent wealth management community, Corient serves ultra-high net worth families, business owners and institutional clients by providing access to special situations such as private equity, real estate, etc. With this sophisticated approach come the traditional challenges of managing, analyzing and reporting on alternative investment vehicles. By implementing Canoe's technology, Corient has greater confidence in managing the complexities associated with their specialized programs and scaling their efforts for the future.



"Implementing best-in-class technology is core to the Corient way, and working with Canoe and Addepar has given us the ability to focus wholeheartedly on optimizing our client-directed alternative investment program"

- James Rooney, CEO

ABOUT CORIENT

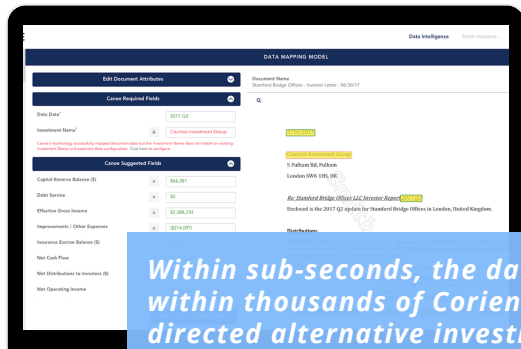
- Founded in 2015
- \$3.1B in AUM and \$5B+ in AUA
- 200+ households
- Headquartered in Newport Beach, California
- Multi-family office offering tailored, needs-based approach
- Tech Stack: Canoe Intelligence, Addepar, iCapital Network

THE CHALLENGE

Streamline the operational complexities associated with ingesting and extracting unstructured reporting data from highly-specialized alternative investments, improve data accuracy and deepen access to data.

THE SOLUTION

Canoe Intelligence. Canoe allows Corient to instantly access, process, and transform unstructured client reporting documents into data, and that data into actionable intelligence.



Within sub-seconds, the data from within thousands of Corient's client-directed alternative investment documents is extracted and prepared for seamless transfer into Addepar and other systems.

THE RESULTS

Corient's implementation of Canoe drastically reduces time spent managing documents, and frees up investment professionals to focus on higher value-add tasks.



REPORTING IN SECONDS

Reduction in time needed to produce reports at month close **from several days to minutes.**



MORE CONFIDENCE IN DATA ACCURACY

Unlocked previously hard-to-access data enabling team members to deliver **institutional-quality insight and client service.**



SCALE OPERATIONS WITHOUT COMPLEXITY

Improved ability to scale data processes by **organizing and managing historical portfolio data in different formats seamlessly**, integrating with other systems like Addepar, and onboarding new clients and advisors without operational hurdles.



PROVING TECHNOLOGY ROI EVERYDAY

Account volumes and AUM have increased, while **tech spend has held steady.**