

CASE STUDY

canoe

CORIENT 

"TECHNOLOGY BUILT TO
SUPPORT OUR SPECIALIZED
APPROACH"

About Corient Capital

- **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**

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.

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.

Solution

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

Client Testimonial

"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

Results

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



More confidence in data accuracy

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



Reporting in seconds

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



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 & advisors without operational hurdles.



Proving technology ROI everyday

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

SEE CANOE IN ACTION

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