

# CANOE INTELLIGENCE

## EXCLUSIVE FAMILY WEALTH REPORT AWARDS INNOVATION SPOTLIGHT INTERVIEW

### What is your solution and how is it innovative within the context of the family wealth market?

Canoe Intelligence developed a first-of-its-kind, purpose-built technology solution that automates document management and data extraction for alternative investments, enabling family office and wealth manager clients to unlock new efficiencies, re-imagine their operational workflows and fuel business growth.

By combining industry expertise with the most sophisticated data capture technologies, Canoe automates the digitization of PDF reporting documents into actionable data and intelligence for family offices and wealth managers, as well as institutional investors and allocators, and asset services.

Innovation is core to our business. We are continually rethinking the way we solve client challenges and we're always searching for the most efficient and creative ways to help clients scale their businesses. It's this iterative mindset that has led us to develop the Canoe product as it is today.

As our clients grow their businesses and evolve, we are determined to continue enhancing Canoe to meet their needs today and into the future.

### How has your solution brought tangible benefits to family wealth management clients? What do they say about your organization?

Canoe's technology has been instrumental in helping family offices and financial institutions modernize their business processes and gain unparalleled access to their data.

With Canoe, family offices and wealth manager clients are able to institute new

document collection and data extraction processes that dramatically reduce operational inefficiencies, free up time and resources to glean deeper insights from their data, and ultimately scale their businesses.

In working with our innovative clients, we've uncovered new ways that Canoe can be used to empower data science initiatives and streamline how clients can gather documents from multiple, distributed portals.

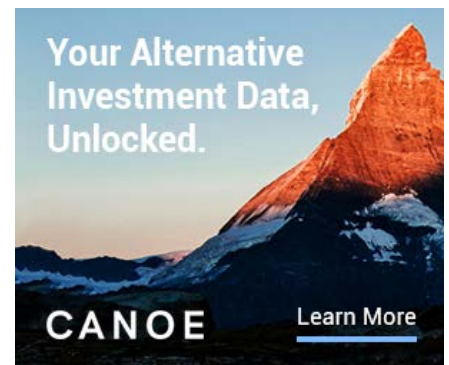
In doing this, clients frequently cite Canoe's ability to help them live their organization's mission with more conviction, knowing that their operational processes are reliable and well-managed by Canoe's technology and experienced team.

### How do you see technology being deployed in and leveraged by family wealth clients in the next 3 to 5 years? Will the pace of change continue, increase or decline?

We believe that the pace of change will continue to accelerate. In Canoe's short history, we've seen an immense amount of interest from family offices and institutions to become more efficient and leverage technology to scale their businesses easily and cost-effectively.

Family offices are certainly looking to access more data and then leverage their data as an asset for reporting and analytics. We believe firms will continue to seek out innovative technology partners who can help them perform these tasks.

Moreover, this transformation is still likely in the early phases and the adoption of automation technology will continue to increase and become more mainstream over the next 3 to 5 years. We're excited about driving that transformation in our industry and for what lies ahead. ■



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