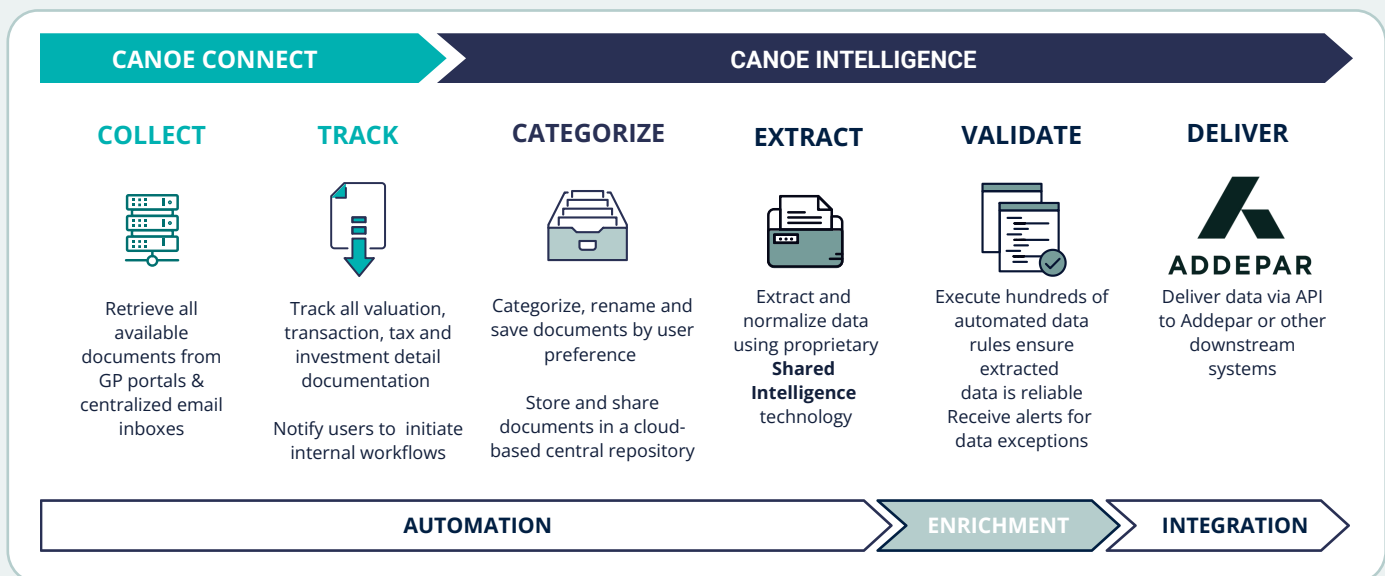


Integrations: Addepar

Automate Your Alts Data Management with Confidence

Canoe powers alternative investment intelligence for a growing roster of 275+ wealth managers, institutions, banks and family offices, including 65+ mutual Canoe/Addepar clients. Through a unique blend of service and technology, Canoe delivers an automated and scalable approach to managing complex alternative investment documents and data with confidence.



- SAVE TIME AND ELIMINATE UNCERTAINTY**
 Enable one automated workflow with easy data oversight
- RAPIDLY COLLECT DOCUMENTS**
 Connect portals and emails to automatically retrieve documents
- CREATE A CENTRALIZED DOCUMENT REPOSITORY**
 Store all documents from multiple sources in one location

- SYNCHRONIZE DATA BETWEEN SYSTEMS**
 Sync ownership structures and investments from Canoe to Addepar
- TIMELY DATA DELIVERY**
 Deliver normalized data to Addepar via API automatically or on-demand
- PROTECT YOUR MOST SENSITIVE INFORMATION**
 Leverage the same tech trusted by the world's largest and most secure firms

Easy Onboarding with Canoe

Canoe acts as an extension of your operations team, doing the heavy-lifting while providing you complete transparency and control over the process. Your to-do list includes the key steps below:



PREP

- Provide portal details and credentials
- Configure Addepar service user for Canoe integration

Canoe leverages this information to configure your platform.



CUSTOMIZE

- Share business requirements
- Discuss team preferences

Canoe optimizes your platform for your unique workflows and guides you in the onboarding process.



EQUIP

- Participate in training sessions

Canoe provides you with ongoing training and support to ensure full utilization and adoption of the platform and automated workflows.

Our Technology is our Differentiator

Canoe's proprietary Shared Intelligence technology maps data from every new fund document introduced into Canoe, speeding onboarding and improving data accuracy.



33K+
fund master
database



12M+
documents
processed annually



50M+
data points
processed annually

Data security and privacy is at the core of Canoe technology and all future development.

More Effective, Efficient Onboarding with Canoe Not Your Typical Service Provider Experience



Clients need only commit about **20 hours over a 12-week period** for implementation



Canoe x Addepar Bi-directional API speeds onboarding and ensures an accurate set up



Canoe's **Shared Intelligence** significantly expedites accurate document mapping



Canoe provides **dedicated implementation lead** specializing in family offices and wealth managers