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Seamlessly integrate with the expanding ecosystem of fund distributors and servicers leveraging the iCapital solution – create a white label platform for alternative fund marketing and service



**WEALTH MANAGERS,
WIREHOUSES & PRIVATE BANKS**

Your branded platform powered by

iCapital.
NETWORK

Market your funds, the **iCapital Menu of funds** or a unique combination of both, to your high net worth investors and provide service for the life of the investment



Your branded platform powered by



Proactively market your funds to advisors and high net worth investors and provide service for the life of the investment

iCapital structures and services feeder funds to bring

access and efficiency to the management of smaller scale investments



Modernize your fundraising and client services

Marketing | Efficiency | Security

ACCESS AND EFFICIENCY IN A QUALITY INVESTOR EXPERIENCE

- Feeder Funds structured and serviced to scale smaller investments
- Seamless advisor and client experience completely consistent with your brand
- Intuitive and consistent workflows across all fund structures
- Simplified interactions across custodians, major fund administrators, and transfer agents
- Streamlined ability to execute capital calls and distributions, and produce and deliver

reporting (PCAPs, K1s, monthly and quarterly updates, etc.)

COMPLETE TRANSPARENCY ALONG THE FUND-RAISING CONTINUUM

- Up-to-the-minute visibility into the entire fundraising pipeline for managers – no spreadsheets required
- Automated alerts for key events to speed processing
- Data is easily integrated into existing firm tracking systems
- Aggregated sales reporting provides full transparency into advisor book building
- Electronic subscription process substantially reduces “Not in Good Order” (NIGO) status incidences

BEST-IN-CLASS PRIVACY AND SECURITY

- Proprietary and permission-based system of configurable workflows
- Data exchange between all parties in the process chain (client, administrators, transfer agencies)
- Complete data encryption and host redundancies adhere to the highest industry standards



Grow and diversify your business

iCapital's technology optimizes your client engagement: streamline investor onboarding, investor qualification, client servicing, and reporting to the high-net-worth advisor and investor market.



ACCESSIBILITY

Centralized and auditable control of fund offerings



SIMPLIFIED

Online subscriptions via fully automated, paperless e-processing



TRANSPARENCY

Complete visibility into every aspect of the fundraising process



INTEGRATION

With administrator, transfer agent, or custodian



CUSTOMIZABLE INTERFACE

Branded as your own



DOCUMENT REPOSITORY

One-click access to every client document to view and share



TRANSACTION AUTOMATION

Online redemptions and transfers



SECURITY

HTTPS TLS v1.2 and fully encrypted PII



UP-TO-DATE SHAREHOLDER RECORDS

Configured for your client communication needs



World-class client relationships

Over 40 fund sponsors and wealth management firms have partnered with iCapital to market their funds and diversify their investor base through our white label technology solution.



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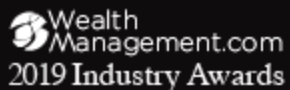
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