



## Background

Direct investor in FinTech start-ups

Direct investor in Private Equity  
Secondaries funds via 5 person  
syndicate



## Solution

### Portfolio Management

4 investments managed on the  
platform

### Corporate Administration

Secure portfolio company formation  
docs, shareholder agreements,  
updates and annual accounts in  
Document Library

### Investor Relations

Provide co-investors access to  
relevant documents to validate  
governance



## Benefits

Management time saving

Easier tracking of portfolio companies

Better enforcement of shareholder  
rights

Easy onboarding of new investors  
into syndicate