

Our Approach to Addepar Delivery

Alpha has deep expertise in implementing Addepar



Key Roles

Implementation

- Serve as an extension of Addepar's implementation team
- Completed the same training as Addepar employees and have a deep understanding of the platform's full functionality
- Adhere to Addepar's implementation standards to ensure consistent and high-quality delivery

Platform SMEs

- Solution Architects with deep subject-matter expertise in investment management platforms
- Specialists in configuration and custom reporting
- Guide clients through all aspects of the platform

Managed Services

- Provide ongoing support and additional services post-implementation
- Capable of creating custom reports and tailored solutions to meet client needs

Data SMEs

- Solution Architects with deep SME knowledge of Addepar
- Expertise in development and configuration
- Deep understanding across Data, Cloud, Infrastructure and Reporting

Asset Manager SMEs

- Experienced in working with institutional allocators and understanding their portfolio monitoring needs
- Leverage insights gained from working with a wide range of clients to inform best practices and deliver tailored solutions

ALPHA'S ADDEPAR EXPERTISE ✓

Alpha consultants are equipped to support Addepar implementations, backed by thorough platform training and deep expertise in investment systems and data solutions. Our technology architects ensure seamless integration for optimal performance.

ALPHA'S ADDITIONAL CAPABILITIES ✓

- 1. Managed Services:** Provide ongoing support post-implementation, acting as an extension of the client's team to maintain and enhance Addepar environments.
- 2. Asset Manager Expertise:** Extensive experience supporting institutional allocators with tailored portfolio monitoring, reporting, and data workflows.
- 3. Data Expertise:** Deep knowledge of data integration, reconciliation, and custom reporting across investment platforms and connected systems.

BENEFITS OF A HYBRID ADDEPAR & ALPHA FMC IMPLEMENTATION TEAM ✓

- Alpha's Program Management and Best Practice
- Alpha's ability to bring objective, independent perspective to both the Client and Addepar
- Scalable Implementation Model based on onboarding volume
- Internal SMEs for in-depth knowledge of Addepar's platform and roadmap
- Addepar can pick and choose the most effective areas for external support