

CLIENT

square 1 | ASSET MANAGEMENT

a subsidiary of PACIFIC WESTERN BANK

OVERVIEW

To meet the needs of Square 1 Asset Management's wide variety of clients, Clearwater provides them with a daily reconciled accounting book of record. Clearwater's customizable reporting generates the data and disclosures needed by all clients, from smaller, privately-funded clients to larger, publicly-traded clients. With Clearwater, Square 1 is always confident that their clients' data is accurate, up-to-date, and easily accessible.

The innovative Clearwater solution is backed by system experts who closely partner with Square 1 to ensure system functionality is always improving and the Square 1 team is trained on new features that benefit their daily operations.

INVESTMENT MANAGER PROFILE

INDUSTRY

- Institutional asset management
- Specializes in short-term liquidity management

ASSETS UNDER MANAGEMENT

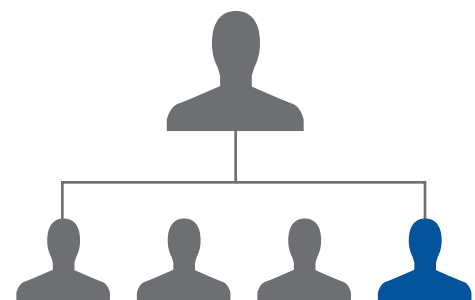
- \$1.5 billion +

REASONS FOR CHOOSING CLEARWATER

- ✓ Automated and daily reconciled accounting book of record
- ✓ Partnership with a dedicated and proactive client services team
- ✓ Seamless scalability to support rapid growth and increase complexity
- ✓ Flexible reporting for clients and internal stakeholders

“I cannot emphasize the importance of our Clearwater partnership enough. It gives us the confidence that if our clients have any questions about their data, we can always rely on Clearwater to find the answer. The level of confidence that Clearwater gives us has made our jobs so much easier.”

Sook-Kuan Loh
VP, Chief Compliance Officer
Square 1 Asset Management



Clearwater is an Extension of
the Square 1 Team

TO LEARN MORE, PLEASE CONTACT US AT
208-918-2252 OR SALES@CLEARWATERANALYTICS.COM