

CLIENT

Control4[®]

OVERVIEW

Control4 was in the process of establishing asset management relationships and wanted a tool to streamline the process and aggregate data across their separately managed portfolios. Their managers strongly recommended Clearwater as the best way to manage their portfolio and simplify their investment accounting processes.

Clearwater facilitates efficient collaboration between Control4 and their asset managers, streamlining communication and providing consolidated reports for all parties. Clearwater's automated reporting provides faster month-end closes for Control4's investment accounting team, enabling them to dedicate more time to making strategic investment decisions. With Clearwater, Control4 has consolidated, accurate data, reduced manual processes, and faster reconciliation for detailed reports.

CORPORATE PROFILE

INDUSTRY

- Smart Home Automation Technology

PORTFOLIO

- \$40-80 million +
- Equities, corporate bonds, agency discount bonds, certificates of deposit, and more

REASONS FOR CHOOSING CLEARWATER

- ✓ Composite view of entire portfolio across multiple managers
- ✓ Automated daily reconciliation for faster month-end close
- ✓ Reduction in manual processes and unnecessary Excel work
- ✓ Best-in-class client services team providing unlimited support

“When we decided to set up relationships with our asset managers, they considered Clearwater to be the go-to tool, and we know why. It's user-friendly, it consolidates our data, and it makes our month-end closes much more efficient. We would definitely recommend it.”

Mark Novakovich
Chief Financial Officer, Control4



Consolidated View across
Separately Managed Accounts

TO LEARN MORE, PLEASE CONTACT US AT
208-918-2400 OR SALES@CLEARWATERANALYTICS.COM