

CLIENT



OVERVIEW

The Knights of Columbus's investment accounting and reporting system was bogged down by work-arounds. Their complex investment strategy required more support than their provider could deliver, and as Knights continued to grow, their investment and accounting system's costly upgrades and delays were holding them back.

With Clearwater's web-based platform, Knights is never left waiting for system upgrades. Clearwater's automated and integrated accounting data provides Knights with in-depth visibility into their risk, compliance, and performance at anytime, anywhere. Clearwater also enables Knights to seamlessly incorporate new initiatives with no burden on internal IT teams or end-users. Clearwater's industry experience, regulatory expertise, and continuous proactive enhancements keep Knights ahead of the regulatory curve.

INSURER PROFILE

INDUSTRY

- Life Insurance

PORTFOLIO

- \$22 billion +

REASONS FOR CHOOSING CLEARWATER

- ✓ Expert client success teams providing industry insights
- ✓ Streamlined implementation that wouldn't slow down their team
- ✓ Flexible web-based system with proactive enhancements and upgrades
- ✓ Automated daily reconciliation that delivers timely, accurate, and up-to-date investment data

“ The Clearwater implementation was the best I've been involved in. Clearwater stayed in control and on track throughout the project, even though it was very complex. They did a good job of keeping everyone up-to-date. We really value the amount of time and effort Clearwater puts into staying ahead of the curve, rather than sitting back and waiting. They are constantly looking to make enhancements for us, so we can spend our time analyzing our portfolio rather than implementing and testing software. ”

Tom Brockett

Chief Accountant, Knights of Columbus



Proactive Updates and Industry Expertise

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