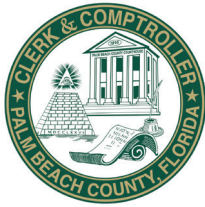


## CLIENT



## OVERVIEW

The Palm Beach County Clerk & Comptroller office's manual investment accounting processes meant that portfolio accounting and reporting required days of work at period-end. Mark-to-market adjustments were processed monthly because the manual work required was so time-intensive.

With Clearwater, the Clerk's office now receives automated investment data, increasing accuracy and timeliness while streamlining their accounting and reporting processes. They no longer struggle with manual data input. They can now mark-to-market daily, facilitating a more timely distribution of investment income to county funds. Clearwater's integrated system also enables the Clerk's office to independently analyze portfolio performance and make more strategic, analytics-based decisions instead of spending time manually inputting data.

## GOVERNMENT PROFILE

### INDUSTRY

- County Government

### PORTFOLIO

- \$2 billion
- Money market funds, certificates of deposits, sovereign government debt, structured securities, and more

TO LEARN MORE, PLEASE CONTACT US AT  
**208-918-2252 OR [SALES@CLEARWATERANALYTICS.COM](mailto:SALES@CLEARWATERANALYTICS.COM)**

## REASONS FOR CHOOSING CLEARWATER

- ✓ Daily reporting in accordance with GASB guidance
- ✓ Independent, transparent view into investment portfolio holdings
- ✓ More timely and accurate data through automated investment accounting and reporting
- ✓ Streamlined processes maximizing efficiency for a lean investment team
- ✓ In-house analytics and performance measurement

“Clearwater has given us unprecedented portfolio transparency and control over our investments. Access to this important data contributes to our success in protecting public funds and maintaining liquidity, while also allowing us to provide one of the highest-yields among county portfolios in the US.”

**Sharon R. Bock, Esq.**

*Clerk & Comptroller, Palm Beach County*



The Clerk & Comptroller, Palm Beach County receives automated mark-to-market adjustments

# DAILY

in accordance with  
 GASB guidance