



FOR IMMEDIATE RELEASE

Moors & Cabot Selects Clearwater for Comprehensive Portfolio Reporting

BOISE, Idaho — June 23, 2020 — Clearwater Analytics and Moors & Cabot announced today that Moors & Cabot has selected Clearwater’s solution for automated investment data aggregation, reconciliation, and reporting services.

Founded in Boston in 1890, Moors & Cabot serves thousands of investors from its headquarters in Boston and through branch offices around the country.

Clearwater’s innovative solution for investment data management and sophisticated client reporting tools support Moors & Cabot’s mission of leveraging best-of-breed technology to create a personalized experience for its clients. Clearwater provides a single solution for daily, updated, and validated portfolio information along with configurable reporting that can be tailored to a client’s specific needs. This allows advisors to deliver meaningful information and analysis to their clients.

“As a firm focused on client relationships and delivering personalized service, we carefully consider the best tools to have in place to drive a differentiated client experience. We found Clearwater to be the right solution to enhance our reporting and further our commitment to clients,” said Michael Hildreth, Chief Financial Officer at Moors & Cabot.

“Moors & Cabot can rely on Clearwater to scale with their growth, support their client-centric approach, and help strengthen their business for years to come,” said Scott Erickson, Chief Operating Officer at Clearwater Analytics.

“Moors & Cabot has an impressive history, and we look forward to working with their team in this new chapter with Clearwater.”

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About Moors & Cabot

Established in Boston in 1890, Moors & Cabot is a full-service investment management firm that works with select individuals, families, businesses, and institutions to build, manage, protect, and transition their wealth and investments. Moors & Cabot believes the relationship is at the heart of everything we do. We bring to bear best-of-breed tools, technology, and research combined with experienced advisors and deliver it all in a personalized approach.

Additional information about Moors & Cabot can be found at www.moorscabot.com.

About Clearwater Analytics

Clearwater Analytics is a global SaaS solution for automated investment data aggregation, reconciliation, accounting, and reporting. Clearwater helps thousands of organizations make the most of their investment portfolio data with a world-class product and client-centric servicing. Clearwater offers a full complement of middle- and back-office solutions like trade confirm/affirm, client billing, composite management, client statements, and more.

Each day, the Clearwater solution reports on more than \$4 trillion in assets for clients that include American Family Insurance, Arch Capital, Aureum Re, Cisco, CopperPoint Mutual Company, C.V. Starr & Co., Facebook, J.P. Morgan, Knights of Columbus Insurance, Oracle, Selective Insurance, Sirius Group, Sampo International, Starbucks, Unum Group, WellCare Health Plans, Wilton Re., and many others.

Since its founding in 2004, Clearwater has provided a cloud-native solution that helps investors make the most of their data. Investment professionals in 49 countries trust Clearwater to deliver timely, validated investment data and in-depth reporting.

Additional information about Clearwater can be found at www.clearwater-analytics.com

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