



FOR IMMEDIATE RELEASE

Oak City Consulting Selects Clearwater for Investment Data Management, Reporting, and Middle-Office Tools

BOISE, Idaho — July 23, 2019 — Clearwater Analytics and Oak City Consulting announced today that Oak City Consulting has implemented Clearwater’s web-based solution and services for investment data aggregation, reconciliation, reporting, and other daily processing.

Oak City Consulting is CEFEX-certified and provides institutional investment consulting to Christian foundations, endowments, and families. The firm strives to provide best-in-class services to create true institutional quality in the delivery of asset allocation, manager selection, custody services, performance reporting, due diligence, and investment policy review.

Clearwater’s integrated data management and reporting capabilities provide Oak City Consulting with clean, validated portfolio data every day. This comprehensive data set is further leveraged with Clearwater’s middle-office tools for business tasks like client billing and statements. Oak City Consulting also utilizes Clearwater for compliance monitoring to ensure its clients’ portfolios align with their investment policies, an integral part of its business model.

“We are impressed with the tools and services Clearwater provides ensuring accuracy and enhancing what we can offer to our clients,” said Daniel Ward, Director of Operations for Oak City Consulting.

“Oak City’s culture is an excellent match for Clearwater, with an emphasis on enhancing client experience and finding ways to further eliminate manual work,” said Scott Erickson, COO at Clearwater Analytics. “Through collaboration and innovative technology, we continue to strengthen this partnership and look forward to Oak City’s adoption of new enhancements to come.”

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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 \$3 trillion in assets for clients that include Arch Capital, Cisco, CopperPoint Mutual Company, C.V. Starr & Co., Facebook, J.P. Morgan, Knights of Columbus Insurance, Mutual of Omaha, Oracle, 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 more than 25 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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