



FOR IMMEDIATE RELEASE

Ultralat Capital Markets Selects Clearwater to Establish RIA Business and Support Multinational Data Processing

BOISE, Idaho — August 28, 2019 — Clearwater® and Ultralat Capital Markets announced today that Ultralat Capital Markets has implemented Clearwater’s web-based solution and services for investment data aggregation, reconciliation, client reporting, and more.

Ultralat Capital Markets BD, a full-service broker-dealer, and Ultralat Investment Advisors are indirectly owned by Ultraserfinco S.A., one of the largest independent broker-dealers in Colombia. The firm offers institutional sales and trading, wealth management, and investment solutions with a focus on Latin American clients.

Clearwater provided Ultralat with the data, tools, and flexibility to add the registered investment adviser business to its overall offering. Clearwater’s multi-currency, multi-asset class solution gives Ultralat the technology it needs to support growth and incorporate new strategic product offerings. Ultralat also utilizes Clearwater’s suite of investment management tools for billing and enhanced statements to deliver polished, tailored reports to clients. With Clearwater, Ultralat has consolidated systems and gained more independence and control, and can seamlessly add custodian connections as their clients require.

“We are very impressed with the technology and capabilities we have with Clearwater. In turn, we can use Clearwater’s tools for investment managers to better service our clients,” said Carlos Coll, Chief Operating Officer at Ultralat.

“This partnership aligns Clearwater’s focus on highly scalable technology and services with Ultralat’s plans for growth and diversification into new business lines. We look forward to a mutually beneficial partnership,” said Scott Erickson, Chief Operating Officer at Clearwater Analytics.

###



About Ultralat

Ultralat offers an array of financial services with local know-how and international expertise thanks to its strong relationships in Latam, a clearing / custody agreement with Pershing Bank of NY Mellon and affiliated companies in South America. Ultralat Capital Markets, a broker-dealer, provides personalized investment services to individuals, corporations and financial institutions, while Ultralat Investment Advisor offers wealth management services and multi-family office advise.

With AUMs of USD 515 million, Ultralat is one of the most competitive FINRA Registered firms in Colombia. This, along with its close relationship with its affiliate, Ultraserfinco, one of the oldest and most prestigious broker-dealers in Colombia, make Ultralat a key player in Latam.

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, 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 | LinkedIn: <https://www.linkedin.com/company/clearwater-analytics/> | Twitter: @cwanalytics

Contact: Lauren Brassey | Director of Marketing | +1 208 489 3909 | lbrassey@clearwateranalytics.com

###