



VENDOR INFO

Year Founded	2006
Headcount Total	58
Parent Company	N/A
Affiliated Companies	N/A
Funding Status	PE-backed
Headquarters Address	590 Burbank St. Suite 220 Broomfield, CO 80020 United States
Website	Click Here
ILPA - Full Profile	Click Here to View

Product Overview

Portfolio Monitoring - Private Capital	N	Fund Due Diligence Analytics	N
Portfolio Monitoring - Multi-Asset Class	N	Due Diligence Questionnaire Engine	N
Portfolio Monitoring - ESG	N	Waterfall Distribution/Fee Engine	N
Back Office/Fund Accounting	N	Research Management System	N
Data Extraction Technology	N	Contact Management	Y
Market Data	N		

Differentiation Statement

Altvia powers investor experiences that fuel growth and success. By connecting communications, data insights and collaborative workflows, Altvia bridges the gap between investment data and daily operations through its integrated platform. Organize solicitations and track relationships with a software solution purpose-built for institutional investors.

Product Customization Options

The platform can be easily configured to meet client needs/requirements. Workflows, integrations, layouts and fields can all be configured by Altvia's team or a trained client administrator.

Product Cost Structure

The platform price structure is on a per user/per year basis.

Product Implementation - Typical Timeline and Support Structure

Product implementation typically takes six to eight weeks to complete.

Integration and API Functionality

Altvia's CRM is built on the force.com platform and therefore can utilize countless Salesforce Appexchange integrations, including Outlook, Gmail, Pitchbook, CapitalIQ and Datafox. There is also API functionality.

Managed Data Services Overview

Vendor does not provide this service.

Client Overview

Client Support Approach and Availability

Altvia has an internal support team with 24/5 availability.

Client Training

Client training includes a project completion workshop with a designated Customer Success Manager, ongoing webinars and how-to videos and the Altvia Community as a self-service help center.

Sample Clients

Texas Permanent School Fund State Board of Education; Investors Management Corporation (IMC); California Institute of Technology Endowment; The Dietrich Foundation; Rockefeller University Endowment

Year First Client	2007
Number of LP Clients	27
Number of GP Clients	151

Contacts

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