



# Green Hill

Make performance personal!

## Who We Are

GreenHill started in 1991 by bringing investment reporting to the industry in a different manner. Over the last 30 years, we leveraged our extensive investment consulting experience to deliver investment monitoring services designed to keep pace with the changing needs of the industry.

What makes us different from other large performance reporting companies is our attention to detail and personalized service that allows you to tell your clients' investment stories with confidence.

This is all because GreenHill believes that simplicity makes everything better for everyone. The company is continually in a quest to make the investment performance reporting process an easier one for employees and customers alike.

## What We Do

Bring investment stories to life



### UNCOVER INSIGHTS

Help advisors sort through the noise so that they can quickly uncover relevant and valuable insights



### EMPOWER DECISIONS

Empower portfolio managers to make more informed decisions faster, mitigate risk, and optimize performance



### ENABLE ACTION

Enable investors to distill, manage and act on financial information that's been presented in a more effective and easy-to-interpret manner

## Why We Do It

Simplifying the complex for advisors and end clients

- ▶ **ADVISORS**  
Increased speed and efficiency in evaluating data to support the decision-making process
- ▶ **PROCESS**  
Error reduction by eliminating manual data entry and time consuming reconciliations
- ▶ **CLIENTS**  
Increased transparency and accountability as a basis for achieving your ultimate goals
- ▶ **BUSINESS**  
Added versatility by creating customized reports for a variety of purposes

## Keys to Success

Solving problems and keeping clients happy

### Turnkey

Web-based, dynamic, real-time reporting that integrates well within your firm's core wealth management architecture

### Integrated

Established strategic alliances and formalized interfaces with books and records platforms and other financial services custodians and companies

### Transparent

Comprehensive performance metrics enabling our clients to deliver everything needed for periodic reporting

### Timely

Typically exceed 5/7 day SLA with monthly data processing for our clients  
Special requests and inquiries usually handled within a couple of hours

### Customizable

On-line report flexibility that allows users to select their own time periods, sectors and benchmarks. Report content and format can be changed on the fly

# ReportQuest

Powerful platform that evolves with the investment industry



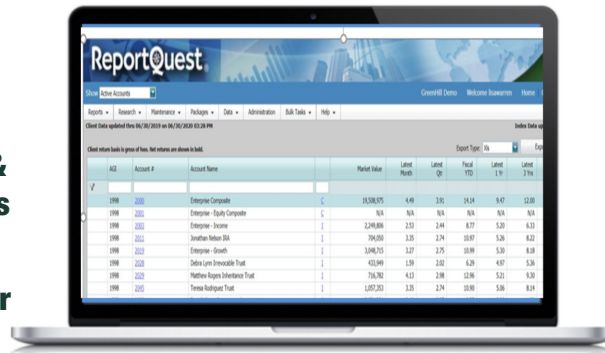
**Powerful technology**



**View inclusive of composite & detail accounts**



**Customize your reports**



**Drill-down capabilities**



**Research capabilities**

## Why Work With Us

Our Passion Is Serving You

### ► We make performance personal

GreenHill takes a personal approach to performance reporting. You'll never need to choose from limited options - we help you design your own options. We listen with the goal to provide each client the optimal tools for their investment reporting and analysis.

### ► Proven experts with 25+ years of experience

When you partner with GreenHill, each client has a personal member of our Client Services Group who manages all aspects of the relationship. Your Account Manager is responsible for auditing and processing your data, which gives them the knowledge to answer questions and support the entire performance reporting process. They are empowered to take action to address any issues that might arise, as well as adjustments to source data, when necessary.

### ► Our core offering is our focus

Investment performance reporting is our core competency. We use it to guide every new product or service decision. GreenHill plans to stay focused on doing only what we do best - providing solutions that are easy to use, powered by leading edge technology, and of the highest quality. And, we have and will continue to reinvest in the platform to expand feature functionality to help our clients.

### ► Simplifying the complex

From the outset, we strive to make things easy for clients with a guided implementation process. We work side by side with clients until completion to ensure success. The familiarity of each Account Manager with client data and operational circumstances allow them to take a proactive approach to ensure data and reporting integrity.

## Contact Us



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