

Making Your Move: What to Expect When You Migrate to ReportQuest



Migrating to a new reporting platform sounds complicated. In practice, with GreenHill, it is not. Our team manages the process from start to finish. Your data arrives intact. Your team learns a platform that most firms find intuitive within the first week. And your clients start receiving better reporting without knowing anything changed on your end.

Here is how it works.

1 Step 1 - Discovery call

We start with a conversation about your current setup: how many accounts, which custodians, what your historical data looks like, and what your reporting requirements are. This takes about an hour and gives us everything we need to scope the migration accurately. No surprises later.

2 Step 2 - Data mapping and transfer

GreenHill's team maps your existing data structure to ReportQuest and manages the full transfer of your historical records -- transaction data, performance calculations, composite history, and audit trails. We do not hand this back to you. We handle it.

3 Step 3 - Validation

Before anything goes live, we validate your historical data against your source records to confirm accuracy and completeness. We audit the transactions, and if something does not reconcile, we flag for review with you.

4 Step 4 - Custodian connections

We establish your data feeds from your existing custodians directly into ReportQuest. Your custodian relationships do not change. The data simply flows to a new destination.



Timeline

Most migrations complete within four to eight weeks depending on account volume and data complexity. We will give you a specific estimate after the discovery call.

Pricing

We work with migrating firms to structure onboarding in a way that removes barriers. Talk to us. We will be straightforward about what it costs and what is included.

Ready to talk?

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Independent since 1991

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Step 5 - Configuration and training

We configure ReportQuest to match your firm's reporting preferences - benchmarks, report schedules, custom layouts, household structures. Your dedicated GreenHill specialist walks your team through the platform. Most firms are comfortable within a few sessions.

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Step 6 - Go live

You begin producing reports. Your dedicated specialist remains available for questions, customization requests, and anything that comes up. Same-day response. U.S.-based. No ticket queues.

What comes with you

- Full transaction-level history
- Performance calculation records
- Composite data and history
- Audit trails and documentation
- Existing custodian data feeds

What you gain

- Deeper, richer reporting than most firms had before
- Drill-down to the transaction level
- Custom and blended benchmarking
- Security-level attribution and contribution
- Consolidated household and multi-account views
- Risk-adjusted analytics
- Modern, visually compelling report presentation
- A dedicated U.S.-based specialist who knows your book

