# MIRADOR

# We Serve Those Who Serve Wealth

**FAST FACTS**

Founded in 2015, we have over 60 professionals in Darien, CT (HQ), Chicago, Salt Lake City and Dublin, Ireland serving clients in North America, South America, Australia and Europe.

**CLIENTS**

U/HNW Families and SFOs
Wealth Managers and RIAs
Endowments & Foundations

## Consolidated Financial Reporting

We operate industry-leading 3rd party systems to aggregate and report on assets, no matter where they are custodied. Award-winning reporting service includes all asset classes – liquid securities, alternative investments, hard assets and collectibles.

### Ask Us About...

- Proprietary attributes and formulas
- Customized reporting for each client
- Metrics Packs add-ons
- Ownership and reverse ownership reporting
- Dedicated Client Advocate (CA) team

## Expert Services

We counsel clients on their specific technology needs before designing, sourcing and implementing a custom solution. Unlike many providers who leave, we will stay and act as oCTO if desired (operating and maintaining your system) allowing advisors to focus on value creation.

### Ask Us About...

- Streamlining workflows
- Mitigating operational risk, time and cost
- Mirador's 15 Technology Decisions Rubric
- The Gateway portal and dashboard

## Middle Office Services

We support existing client teams in the important but often time-consuming middle office tasks vital to a smooth adviser operation. Whether direct client advocate support or in cocombination with our BEMA technology stack, clients select and pay for only what they need.

### Ask Us About...

- Client onboarding account maintenance
- Wire and trading activity support
- Private investment subscription documents
- Capital call management
- Client fee calculation and invoicing

## Advisor Technology Platform

Our Advisor Technology Platform delivers best-in-class technology and operations systems, unified on one independent non-regulatory platform. This open architecture stack is preconfigured to clients' needs and features a flexible construct, ensuring automatic upgrades to future innovations and tools.

### Ask Us About...

- System features and functionality
- Integration with client relationship system (CRM)
- Zero business interruption migration plan
- Middle office support capabilities
- CA teams acting as an extension of your team

## Advisor-Client Portal

Our Gateway portal allows advisors and clients to connect securely to share timely information and build lasting relationships. With a personalized dashboard and standard-setting features, Gateway extends the digital environment to create a seamless and secure client experience.

### Ask Us About...

- Personalization features
- Newsfeeds, blogs, and social posting
- Real-time communication tools
- Integration with existing tools
- Security safeguards