

# How Venn CSS Team Works With Clients

Our dedicated Client Solutions Specialist team (CSS) works closely with clients prior to contract signing, throughout onboarding, and beyond to support your team.



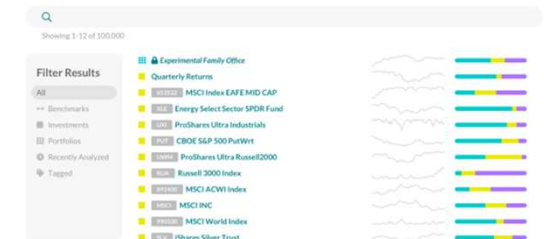
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## Onboarding & Data Configuration

- **Investments:** Review the Venn library of Mutual Funds, ETFs, indices, etc. Assist with uploading your bespoke return streams for existing line-items and prospective managers.
- **Portfolios:** Help build out the tree-structure of asset classes / sub-asset classes for your pools of capital.
- **Integrations:** Facilitate available APIs with custodians / administrators, whereby we can automatically pull in line-items, recent NAVs and portfolio structure to your workspace.



## Your Library



# How Venn CSS Team Works With Clients

## Ongoing Service & Connectivity

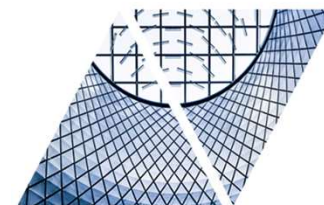
- **Recurring check-ins** to discuss output and answer questions about the platform.
- **Quick response time** and available for calls as needed.
- **Proactive outreach** when new content has been published and new features are available, accompanied by training on how to use them.
- **Product beta-testing and feedback** for certain product enhancements and connections directly with our product team.



### CLIENT SPOTLIGHT

#### A Conversation with Meena Lakshmanan – Head of Alternatives, LgT Vestra

Meena Lakshmanan discusses the investment management landscape and LGT Vestra's experience with Venn Pro.



### VENN FACTOR PERFORMANCE REPORTS

#### March and Q1 2022 Venn Factor Performance Report

This Venn Factor Performance Report will consist of two sections: one in which we'll focus on March 2022 factor performance and another that provides Q1 2022 factor performance.