



# Out of the Box AI in Action

Built on Open AI and powering a customer relationship management offering optimized for private markets executives and deal professionals, InvestorFlow's out-of-the-box AI capabilities deliver advancements and efficiencies across the entire solution and signal what will be possible in the future.

10,000+  
Institutions

3,500+  
Funds

\$6+ Trillion  
Client Assets

290,000+  
Limited Partners

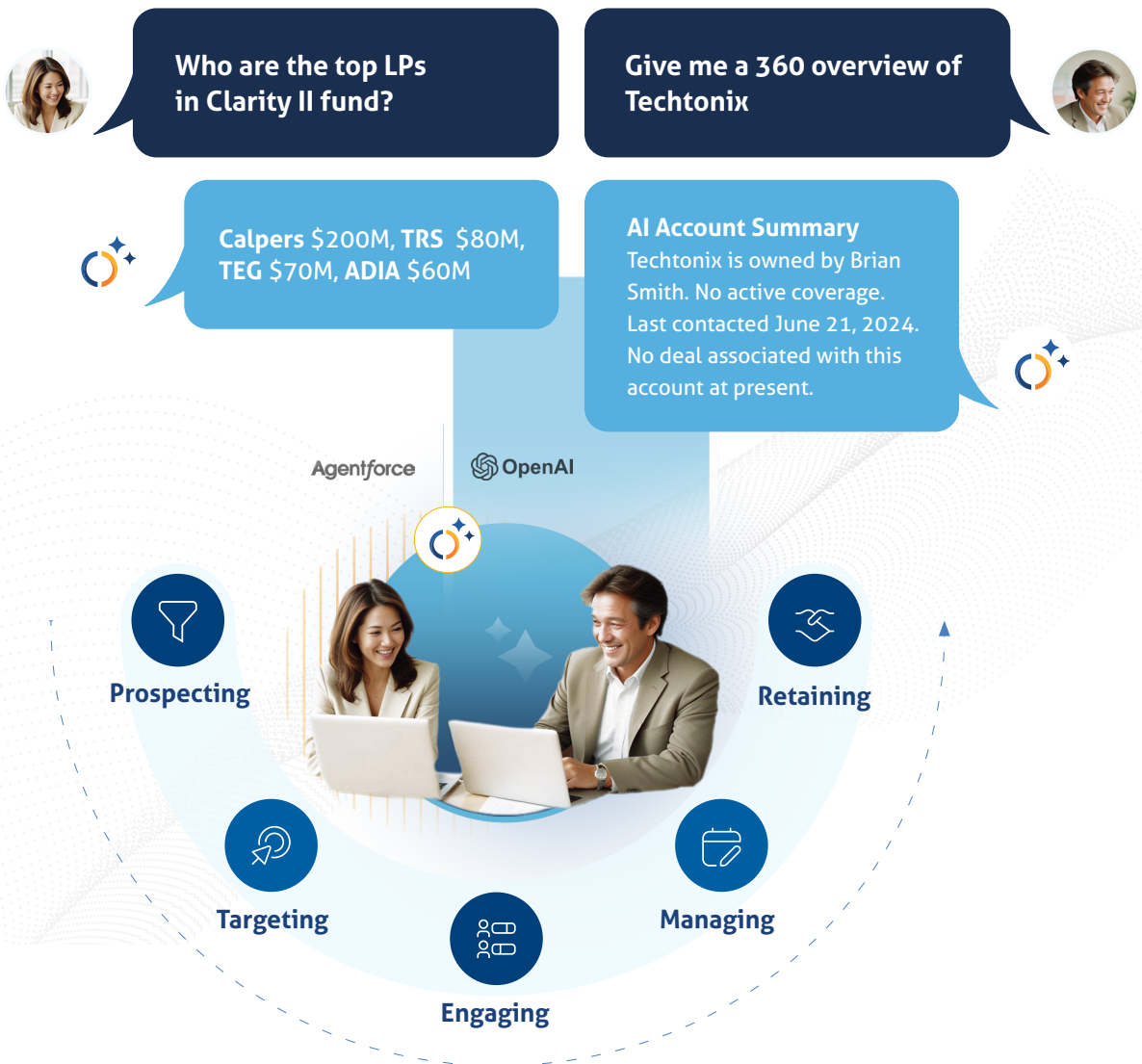
28,000+  
Deals Closed

Powered by  
InvestorFlow AI



## A Focused Approach

# InvestorFlow AI Anywhere. Powering Your Dealmaking Firmwide.



### Prospecting

#### AI Enhanced List Generation

InvestorFlow AI generates prospect lists with contextual insights, interaction summaries, and existing firm relationships to ensure you put the right product in front of the right prospect

### Targeting

#### AI Enhanced Target List

Based on your relationship score and previous context, InvestorFlow AI will suggest the targets with the highest probability to close.

### Engaging

#### AI Campaign Builder

AI Campaign Builder will generate language and even map out a sequenced sales campaign for any given LP or target company.

### Managing

#### Intelligent Call Sync

InvestorFlow AI removes the administrative burden associated with updating your pipeline. Focus less on the busy work and more on building a fruitful relationship.

### Retaining

#### AI Generated Tearsheets

Complete LP profiles generated by InvestorFlow AI ensure you have the most up to date information before every LP interaction.

## Targeted, Practical AI to Drive Your Deals Firm

# Empowering Private Markets with AI

### Fundraising

AI enables firms to extract better insights regarding their investors' preferences, which enables smarter engagement and simplifies how fundraisers update pipeline records directly from meeting notes and email, automatically generating communications to drive deals forward.

### Deal Management

AI synthesizes 360 views of deal targets, combining content from documents, meeting notes, email and third-party data such as Pitchbook and Preqin into personalized tearsheets. AI also enables deal professionals to source, review, and drive an unprecedented volume of investment opportunities.

### Investor Services

AI is a force multiplier for client services personnel to provide visibility into current investments and customize information on new opportunities for their investors at scale, allowing them to step up to higher value-added work.

### Real-Time Reporting

AI can dramatically reduce the time it takes to generate accurate reports for internal and external stakeholders to drive tighter, more efficient execution.

### Asset Management

AI enables InvestorFlow to aggregate data from a variety of sources to aid in valuation, reporting and actions to optimize returns on capital invested.

Holland Mountain recognizes Agentforce as an industry-leading AI tool, and it's impressive to see how InvestorFlow has seamlessly integrated it into their fund cycle solutions, helping private capital firms enhance efficiency and scale their operations.

### Barnaby Piggott

CEO, Holland Mountain

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# InvestorFlow



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