

## iPM Client Profile – Renaissance Investment Management

Renaissance Investment Management is now live with INDATA's iPM – Intelligent Portfolio Management® platform for its investment operations.

Renaissance Investment Management is



a majority owned affiliate of Affiliated Managers Group (AMG), a Boston-based holding company. Renaissance provides investment management services for a variety of clients including high net worth, institutional and sub-advisory relationships. The Managing Partners of Renaissance average over 20 years with the firm. The firm currently has 4.5 billion in AUM.

Renaissance uses INDATA on a front to back office basis and relies on the system heavily for its reconciliation and CRM capabilities.

One of the key iPM functionality items that appealed to Renaissance was the ability to integrate their workflow and internal checklists into their INDATA process.

“Now that we have iPM in place, we will be able to efficiently manage our internal checklists directly in the system. This allows us to easily keep track of where we are in a given process, for example,

new account openings, and having this on iPM makes it part of our audit trail for compliance purposes,” commented Sudhir Warriar, COO.

Another aspect of iPM which appealed to Renaissance was the actual upgrade process.

“The process of upgrading to iPM was one of our best installs. The staff that INDATA sent on site was very patient and willing to listen to and understand the needs of our end users. This was a pleasant change making it a stress free install,” commented Warriar.

**“Now that we have iPM in place, we will be able to efficiently manage our internal checklists directly in the system. Having this as part of the audit trail enhances compliance”**  
Sudhir Warriar, Renaissance

### About INDATA iPM

INDATA iPM– Intelligent Portfolio Management® is a platform and set of technologies for buy-side firms that allow end users to collaborate in real-time across the enterprise. iPM is designed to increase end user productivity, enhance the investment process and offers real-time risk, compliance and performance monitoring as well as integrated tools for marketing.

**For further information on how iPM can help your firm contact INDATA marketing at [www.indataweb.com](http://www.indataweb.com)**