

CAPABILITIES OVERVIEW

ITILTI Technology Partners

Enterprise DNA,
Boutique Delivery

Specialized IT services for boutique alternative investment
firms

Executive Summary

ITILITI Technology Partners provides enterprise-grade technology services specifically designed for boutique alternative investment firms. We bridge the critical gap that exists for firms with sophisticated requirements but limited resources.

Our approach combines deep expertise in financial services technology with a boutique service model, delivering institutional-grade capabilities at an appropriate scale and cost.

The Enterprise-Boutique Gap

Boutique alternative investment firms face a fundamental challenge: they must satisfy the same institutional investor expectations and regulatory requirements as \$50B+ firms, but with a fraction of the resources. This creates a specific gap in the market for firms with:

BOUTIQUE SCALE

Under 100 employees but sophisticated operations



INSTITUTIONAL NEEDS

\$100M-\$5B AUM requiring institutional-grade technology



RESOURCE CONSTRAINTS

Complex investment strategies with limited IT resources

Most firms struggle with inadequate solutions from:

1 Generic IT providers

who don't understand investment workflows

2 Enterprise providers

with solutions too complex and costly

3 Growing expectations

that exceed internal capabilities

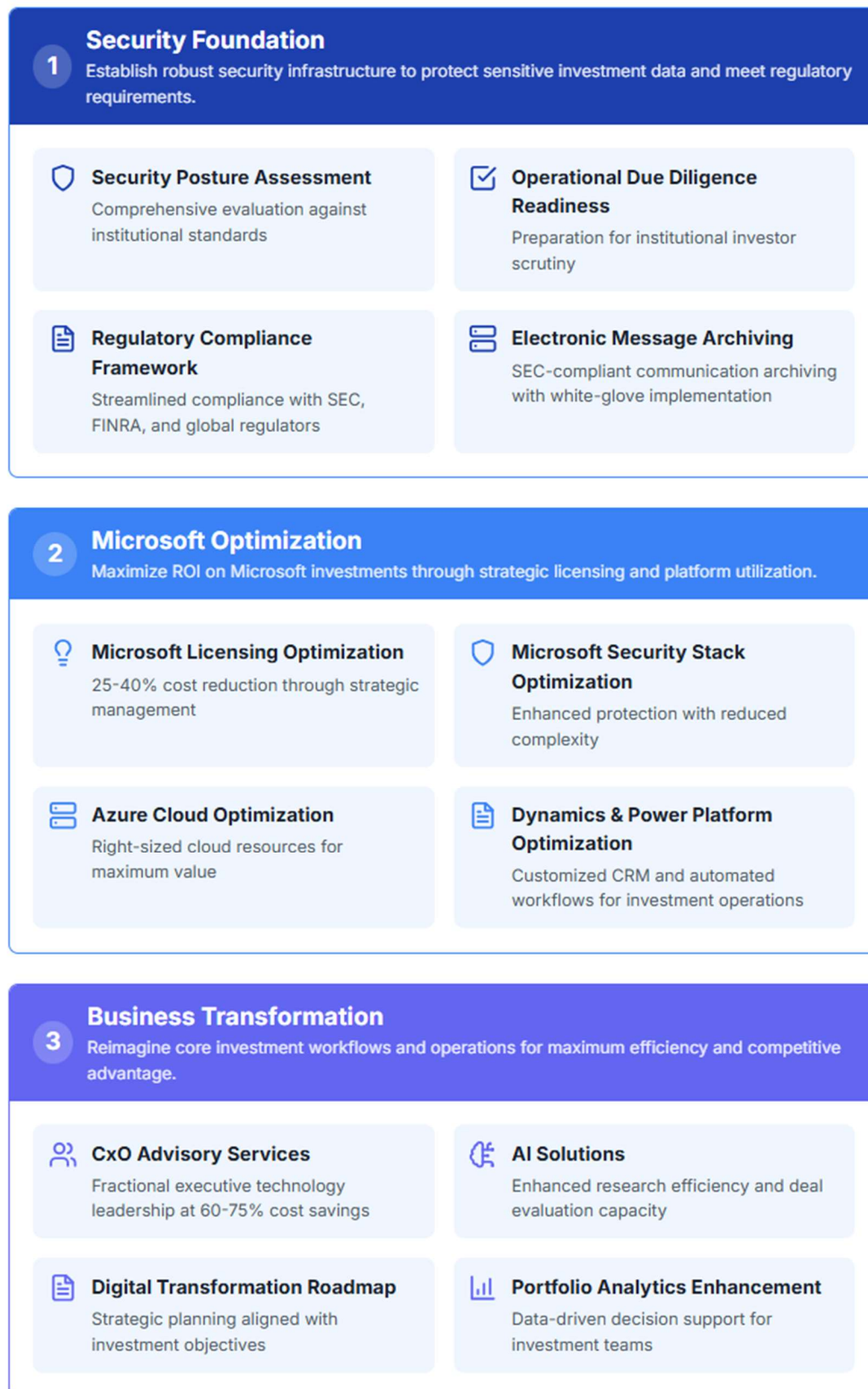
Our Solution

ITILITI bridges this gap by providing:

- ☒ Enterprise expertise adapted to boutique scale
- ☒ Investment-specific technology solutions
- ☒ Right-sized approach respecting resource constraints
- ☒ Growth-aligned architecture that scales with AUM

Our Approach: Enterprise to Boutique Translation

Our comprehensive methodology transforms your investment firm's technology from a necessary expense into a strategic advantage through three key phases:



Our Enterprise Advantage

We deliver specialized solutions for each type of alternative investment firm:

For Hedge Funds

- ✓ **Institutional ODD Readiness:** 92% ODD success rate for clients
- ✓ **Trading-Hour Support:** Zero disruptions during market hours
- ✓ **Scalable Infrastructure:** Technology that grows with AUM

For Private Equity Firms

- ✓ **Deal Security:** Secure collaboration environments for transactions
- ✓ **Due Diligence Acceleration:** 40% faster deal cycle time
- ✓ **Portfolio Company Management:** Integrated oversight solutions

For Venture Capital Firms

- ✓ **Relationship Intelligence:** Enhanced deal flow management
- ✓ **Mobile-First Strategy:** Always-on access for partners on the move
- ✓ **Pattern Recognition:** AI-powered insights across investments

For Family Offices

- ✓ **Ultra-High-Net-Worth Security:** Advanced protection for sensitive data
- ✓ **Multi-Generational Planning:** Technology strategies that span decades
- ✓ **Cross-Asset Visibility:** Comprehensive reporting across diverse holdings

Key Differentiators

Against Generic MSPs

- Deep understanding of alternative investment workflows vs. general business IT knowledge
- Purpose-built for boutique firms vs. one-size-fits-all approach
- Investment-specific methodology vs. generic IT implementation

Against Enterprise Providers

- Equal domain expertise but delivered through boutique service model
- Right-sized for under-100-employee firms vs. enterprise-scale complexity
- Streamlined approach vs. lengthy enterprise deployments

Measurable Value Creation

Our enterprise-to-boutique translation creates measurable value for your investment firm:

92%

ODD success rate

**Enhanced
Capital Raising**

Technology that
meets allocator
expectations

40%

Increased
operational
efficiency

**Operational
Efficiency**

Enterprise-grade
automation at
boutique scale

15%

Improved
investment returns

**Strategic
Advantage**

Focus on alpha
generation, not IT
challenges

3.5x

Growth capacity
without tech
overhaul




**Sustainable
Growth**

Technology that
scales with your
AUM

Client Success Story

Emerging Hedge Fund Secures Institutional Capital

Client Profile:

-  \$120M AUM Long/Short Equity Fund
-  8-person investment team
-  Targeting institutional allocations

Challenge:

Failed multiple operational due diligence reviews due to security deficiencies. Lacked the internal expertise to implement institutional-grade security while maintaining operational efficiency.

Our Approach:

- ☒ Performed comprehensive security assessment against ODD requirements
- ☒ Implemented tailored security stack focused on investment operations
- ☒ Established CISO as a Service model for ongoing governance
- ☒ Created comprehensive documentation for investor due diligence

Results:

\$75M

New institutional
allocation secured

100%

ODD pass rate after
implementation

65%

Reduction in
security incidents

"The security transformation was a game-changer for our firm. We not only passed ODD with flying colors but also discovered that robust security is now a competitive advantage in fundraising conversations."

— Chief Operating Officer

Next Steps

Schedule a Complimentary Consultation

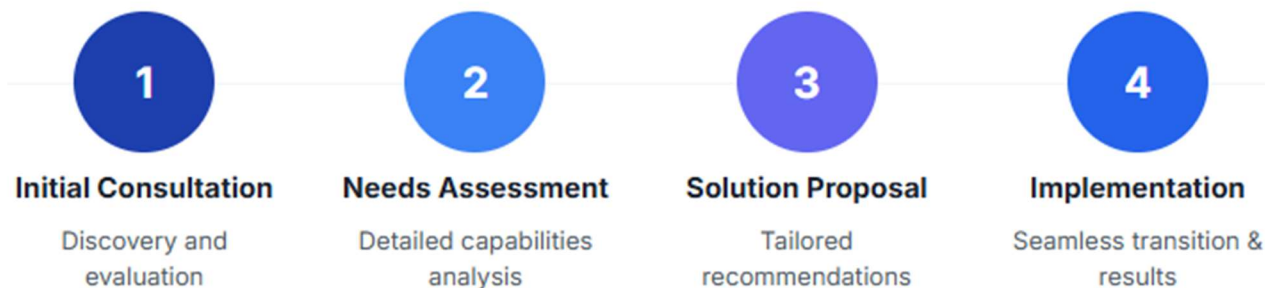
During this 45-minute session, we'll:

- ☒ Assess your current technology environment
- ☒ Identify priority opportunity areas
- ☒ Outline a roadmap for potential engagement
- ☒ Provide preliminary recommendations

Contact us to schedule your consultation

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Our Engagement Process



Ready to transform your firm's technology?

Schedule Your Consultation Today