Client Data Homologation Guidelines

# Introduction

These guidelines are provided to ensure that financial data submitted by our clients is consistent, complete, and formatted for optimal analysis. Adherence to these guidelines will facilitate efficient and accurate financial analysis by our firm.

# Data Submission Format

Clients are requested to submit their financial data in the following format to ensure compatibility with our analysis tools. Each data point should be provided in a separate column as described below.

|  |  |  |  |
| --- | --- | --- | --- |
| Variable Name | Description | Format | Firm Variable Name |
| TotalAssets | Total value of all assets | Currency | Assets\_Total |
| NetIncome | Net income after taxes | Currency | Income\_Net |
| Liabilities | Total liabilities | Currency | Liabilities\_Total |
| Equity | Shareholder's equity | Currency | Equity\_Total |

# Submission Instructions

Please ensure that your financial data is submitted in a single Excel or CSV file, with each variable placed in the corresponding column as outlined above. Submit your data files via the secure client portal on our website. For assistance with data preparation or submission, please contact our client support team.