

# Performance Reporting

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The performance reporting team supports the centralized back-office reporting and accounting functions for the firm. We are responsible for producing both monthly and quarterly performance reporting, as well as assisting in the reconciliation of accounts to assure accuracy. We also aid in the transition of new clients to our performance reporting software, making sure things are as seamless as possible.



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DB Onboarding Form



Institutional Sample Reports



Performance Reporting Tips & Tricks



Wealth Sample Reports