

# CBIZ Alternative Investment & Technology Services

## Empowering Alternative Investment Firms with Next-Gen Technology

In today's complex and dynamic financial environment, rigorous execution of due diligence and deal sourcing and the protection of assets have become top priorities for alternative investment firms. Next-generation technologies offer powerful tools to strengthen security protocols, detect fraudulent activities, and maintain compliance with regulatory standards.

Leveraging technology like artificial intelligence (AI), machine learning (ML), and automation doesn't just streamline back-office tasks; it's transforming how deals are sourced, portfolios managed, risks assessed, and investors engaged.

### Technology's Impact Across the Investment Lifecycle



#### Research & Deal Sourcing

- **Enhanced Data Analysis:** AI and data analytics can help analyze complex datasets, market trends, and alternative sources for actionable insights.
- **Predictive Modeling:** ML-driven forecasts help uncover market movements and trends, supporting smarter investment decisions.
- **Faster Deal Screening:** Automated platforms rapidly screen thousands of opportunities, delivering real-time M&A insights.

- **IT Buy/Sell Due Diligence:** Identifies risks and opportunities in technology infrastructure and cybersecurity during transactions, reducing deal risk and supporting value creation.

#### Portfolio Management & Risk Assessment

- **Advanced Risk Assessment:** AI models dynamically profile risk and conduct stress tests for better mitigation strategies.
- **Continuous Monitoring:** Real-time performance tracking and automated portfolio rebalancing maximize returns.
- **Strategic Optimization:** AI powers optimized allocation and diversification for superior risk-adjusted performance.

#### Operational Excellence

- **Automated Workflows:** Robotic process automation (RPA) streamlines fund administration, accounting, bill pay, compliance, and reducing errors and cost.
- **Managed IT Services:** Proactive managed IT support ensures maximum uptime and reliability for mission critical systems, reduces technology risk, and frees your internal team to focus on investment strategies instead of troubleshooting technical issues.
- **Centralized Platforms:** Secure cloud-based systems improve agility and collaboration across teams.
- **Process, Project & Change Management:** Optimizes fund operations and ensures smooth adoption of new systems, minimizing disruption and accelerating return on investment.

#### Cybersecurity & Compliance

- **Advanced Threat Detection:** AI-enhanced cybersecurity, endpoint protection, and zero-trust frameworks safeguard sensitive data.
- **Compliance:** helps protect sensitive information, reduce exposure to cyber risks, ensure regulatory compliance, and maintain operational resilience. Demonstrating a robust approach to safeguarding client assets and ensuring trust and credibility with stakeholders
- **Automated Compliance:** RegTech solutions automate regulatory reporting and validation for peace of mind.

# Comprehensive Technology Services for Alternative Investments

## **Cloud & Infrastructure Solutions**

- Technology as a Service
- Infrastructure Projects & Management
- Project Management
- Telecom Optimization
- Cloud Services & Engineering
- Value Added Reseller
- Managed Network & Enterprise Branch Management
- Secure Access Service Edge (SASE) Strategy & Implementation
- Business Continuity & Disaster Recovery Planning

## **Managed IT Services**

- Managed Service Provider (MSP & MSSP)
- Remote Service Desk
- IT Staff Augmentation
- Remote Infrastructure Monitoring & Management
- Managed Azure Cloud Services
- Cloud Application Hosting

## **Cybersecurity**

- Governance, Risk & Compliance (GRC)
  - » ISO/IEC 27001 Framework
  - » PCI DSS (Payment Card Industry Data Security Standard)
  - » NY Department of Financial Services (NYDFS) Cybersecurity Regulation
  - » Center for Internet Security (CIS) Controls
  - » AICPA Service Organization Controls (SOC) 2 Trust Service Criteria
- Digital Forensics/Incident Response (DFIR)
- Penetration Testing
- Virtual Security Team/Chief Information Security Officer (CISO) as a Service
- Vulnerability Scanning



## **Enterprise Performance & Technology**

- Robotic Process Automation (RPA) / Artificial Intelligence (AI) / Machine Learning (ML) Automation
- Data Analytics & Insights
- Blockchain & Cryptocurrency Services
- Application Development
- Financial & ERP Solutions (Sage, Acumatica, NetSuite, Microsoft GP/SL, FP&A & Close Management)
- Enterprise Solution Integration
- Financial Systems Stabilization

## **Strategic Consulting**

- Chief Information Officer (CIO) as a Service
- Executive IT Advisory
- Enterprise System Selection
- IT Strategic Roadmap Development
- Digital/IT Transformation
- IT Buy/Sell Due Diligence
- Process, Project & Change Management

## **Emerging Technology Powered by CBIZ**

- 1099-Prep.com
- Sales & Use Tax Automation
- AI Strategy, Risk & Governance
- AI Secure Platform: Vertical Vector AI
- AI Data Readiness
- Data Analytics & Visualizations

## **Ready to Empower Your Fund?**

Contact CBIZ today to schedule an appointment with our Alternative Investment and Technology Services experts.

CBIZ is a consulting, tax and financial services provider that works closely with CBIZ CPAs P.C., an independent CPA firm that provides audit, review and other attest services.

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