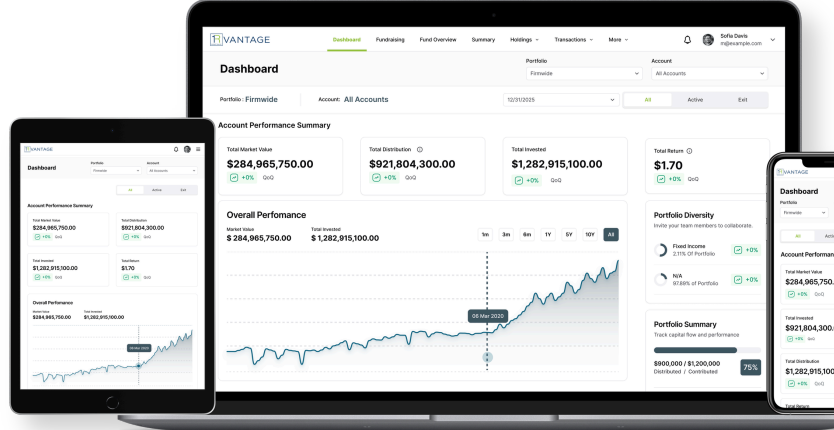


# Vantage Insight: Modern Investor Portals Built for Scale, Control, and Confidence

STREAMLINE ONBOARDING, REPORTING,  
AND COMMUNICATION ACROSS EVERY  
INVESTOR TOUCHPOINT

Bring every stage of the investor lifecycle into a single, connected platform—from onboarding and compliance to reporting and communication.

Designed for firms managing complex portfolios, the Investor Portal delivers the flexibility, security, and integration needed to support growth—without adding operational burden.



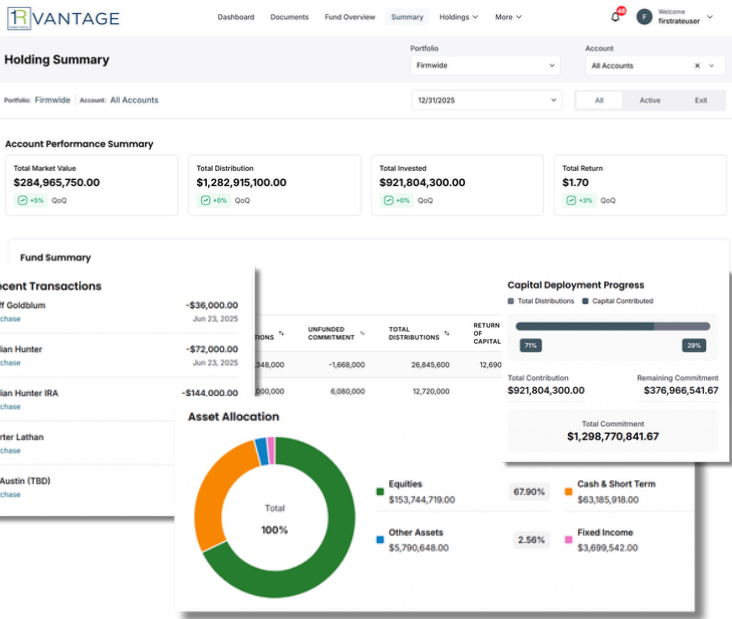
ONBOARDING

COMPLIANCE

REPORTING

COMMUNICATION

DATA MANAGEMENT



## REAL-TIME DASHBOARD & ANALYTICS

Access insights instantly across portfolios.

## COMPLIANCE BUILT IN

SOC 2, ISO 27001 certified.

## TWO-WAY COMMUNICATION

Secure messaging with investors.

## MULTI-DEVICE ACCESS

Desktop, tablet, mobile

## CONFIGURABLE WHITE LABEL

Deliver a fully branded investor experience.

## SECURE DOCUMENT PORTAL

24/7 access to centralized investor materials.

## INVESTOR DATA MANAGEMENT

Maintain accurate contact and wiring info

## WHY FIRMS CHOOSE FIRST RATE VANTAGE

- ✓ Built on institutional-grade data infrastructure
- ✓ Supports complex portfolios and alternative assets
- ✓ Designed for both scale and flexibility
- ✓ Extends beyond portal into reporting + data ecosystem

### See What a Connected Investor Experience Looks Like

We'll show you how firms are replacing fragmented systems with a single, unified solution—while improving transparency, control, and efficiency across the investor lifecycle.