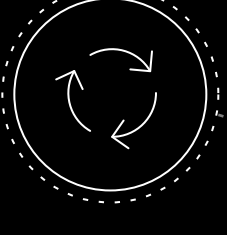


# Your Portfolio Commentary Process is Complicated..

## PREPARATION

Assign resources.

## PROJECT MANAGEMENT



Does internal resource have time?

Find freelancer.

No.

Maybe.

Approve freelancer.

Secure investment communications to write?

No.

Yes.

Secure portfolio manager to write?

No.

Yes.

Distribute timeline for all funds and accounts.

## DATA ACCESS

Validate data.

Cleanse data.

Check attribution.

Prepare for writing.

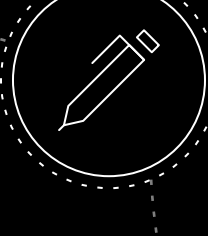
## DRAFTING & REVIEWING

Write first draft.

Edits. Word count.

QA.

## WRITERS



Compliance review.

Yes.

Additional edits?

Prepare for publishing.

No.

## PUBLISHING & DISTRIBUTING

Design.

Style and brand review.

## COMPLIANCE



## MARKETING



Create document.

Distribute to CRM.

Repurpose into other deliverables.

Distribute to print.

Final review and sign off.

Distribute to HTML.



COMPLETE IN 15-20 DAYS

# ...But It Doesn't Have to Be.

## DATA ACCESS

Vermilion Reporting Suite

## DRAFTING & REVIEWING

Quill Portfolio Commentary

## PUBLISHING & DISTRIBUTING

Vermilion Reporting Suite

COMPLETE IN SECONDS!

Learn how you can be Done on Day One

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