

How a Real Estate Firm Modernized Investor Communications with SS&C Intralinks

To support the launch of a \$150 million fund and a growing investor base, a Tampa-based real estate investment firm turned to SS&C Intralinks InvestorVision™ to streamline communications, centralize reporting, and deliver a more efficient, secure investor experience.

Overview

Founded in 1990, the Tampa-based real estate investment firm specializes in office, industrial and healthcare properties. With a strong commitment to operational excellence and long-term relationships, the firm has built an impressive portfolio of high-quality, thoughtfully developed assets.

When launching a USD 150 million industrial real estate fund backed by over 30 investors, the firm needed a scalable solution to modernize investor communications and reduce administrative burdens. By adopting SS&C Intralinks' InvestorVision, the firm centralized document distribution, streamlined investor reporting and simplified its workflow, enhancing efficiency and elevating the investor experience.

Problem

Prior to adopting InvestorVision™, the firm managed investor reporting through time-consuming and labor-intensive processes comprised of emails, phone calls and file-sharing tools. While

Client Success Story

Real Estate Firm

Industry:
Real Estate



Time Savings

Reduced document distribution workload by over 50 percent



Transparency

Gained real-time insights into investor activity and engagement



LP Experience

Enhanced professionalism for the growing investor base



this manual approach worked for smaller projects, the scale and complexity of their new fund demanded a more scalable and sophisticated solution.

The one-to-one system was manageable at a smaller scale, but as the firm grew, inefficiencies became increasingly apparent. Tracking document delivery, maintaining data security, and coordinating with multiple investors proved to be both challenging and time-consuming.

To meet the demands of their expanding investor base, the firm needed a platform that could centralize investor communications, monitor engagement and streamline the distribution of K-1s — all while delivering a more polished, institutional experience.

Solution

After evaluating several platforms, the firm selected InvestorVision for its intuitive interface, robust features, strong reputation and scalability. “We needed a solution to take a significant step toward digital transformation. InvestorVision struck the perfect balance,” says the lead controller at the firm.

Working closely with the SS&C Intralinks team, the firm quickly implemented their investor portal, ensuring all K-1s and key communications were distributed on schedule. The firm’s transition to InvestorVision was both swift and seamless. “The implementation was, in a word, flawless,” says the client. “From onboarding support to learning how to upload, map and manage documents, the process couldn’t have been smoother.”

The team at the firm found the platform intuitive and user-friendly, with helpful integrations that allowed them to get up and running immediately without a steep learning curve. With improved visibility into investor activity through built-in tracking and reporting features, they no longer had to guess whether investors had received the correct documents. InvestorVision provided a clear view of who accessed which files and when, ensuring confidence, accuracy and transparent communications.

Results

Even in its early stages, the adoption of InvestorVision has delivered meaningful results for the firm — most notably, a dramatic reduction in the time spent on investor communications. “We saved over 50 percent of the time we used to spend on K-1 distribution. Instead of emailing 20 people one by one, I can now just upload the documents and notify the entire group at once,” says the client.

K-1 distribution became significantly more straightforward, with real-time tracking ensuring that investors never missed a critical update. Although the firm launched InvestorVision recently, the initial benefits are already evident. The platform has streamlined the distribution of key documents like K-1s, which are a key point of contact for investors.

InvestorVision also enhanced risk management by minimizing the chance of sending the wrong documents to the wrong investors. For the client, who oversees sensitive data and values precision, this was a critical win.

Looking Ahead

By adopting SS&C Intralinks, the firm has modernized its investor communications, ensuring a seamless experience for both the firm and its investors. Looking ahead, the firm plans to expand its use of the platform to include distribution notices and potentially additional funds, further integrating InvestorVision into their long-term investor relations strategy.

The firm’s experience with InvestorVision has been overwhelmingly positive so far. The team is optimistic about the platform’s future role in enhancing investor engagement and operational efficiency as usage expands.