

Unlisted Unit Registry Services

Supporting investment managers with scalable registry, investor servicing and compliance solutions.

What we do

END-TO-END SUPPORT FOR YOUR FUND LIFECYCLE



Investor Onboarding

- Online applications
- Electronic ID and biometrics verification
- AML/CTF screening
- Automated application processing



Registry & Transaction Processing

- Applications & redemptions
- Transfers & Switches
- Distribution processing
- Investor register maintenance



Investor Servicing

- Investor communications
- Tax statements
- Adviser support
- Contact centre services



Compliance & Reporting

- FATCA & CRS
- AIIR reporting
- GS007 support
- Investor reporting

How we deliver

A SEAMLESS EXPERIENCE, FROM SETUP TO SCALE



Purpose built registry platform



Investor, adviser & manager portal



Dedicated client services team



Contact centre support



Capital raising administration



API integrations

Why BoardRoom?



Accelerate investor acquisition



Scale operations efficiently



Enhance investor & adviser experience



Strengthen risk & compliance



SUPPORTING | Equities | Fixed Income | Multi-asset | Alternatives | Private Markets | Real Estate & Property



Combining technology, service and operational expertise to support growth at every stage"

For more information, please contact:



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