

# Simplify Investor onboarding and beyond



## How tech simplifies the onboarding process

Advanced investor relations software can significantly simplify the onboarding process, allowing investment managers to grow their business with fewer headaches for themselves and their investors by:

1. Securely digitizing the capture of sensitive investor data
2. Reducing back-and-forth emails and phone calls with streamlined onboarding workflows
3. Engaging investors with a simplified user experience

Recruiting real estate investors with the promise of an attractive investment opportunity is one of a general partner's most important goals. Capturing a potential investor's interest is followed by another crucial step — onboarding that prospect — a process that encompasses gathering information required to create a subscription agreement. That process can be difficult and not secure when done with paper and spreadsheets or fairly simple for all parties using the **advanced technology** available in the marketplace.

*"Due to rule changes around accessing capital, a higher volume of investors with lower contributions compounded the onboarding burden."*



Until recently, compiling the information required to complete a subscription agreement was a cumbersome, paper-heavy process that burdened GPs and investors alike. The task was characterized by back-and-forth exchanges to gather information. These repeated requests can exasperate prospective investors, sometimes to the point of driving them away.



**A centralized onboarding solution**

Electronic document signature capability and other digitization helped streamline investor onboarding to some degree, but the process as a whole remained fraught. Fortunately, investment management platforms have evolved to make investor onboarding much easier for all parties involved.

Many GPs have adopted platforms that connect all elements of investment management, including onboarding, fundraising, **accounting** and investor relations, in a single platform. By keeping all information in a unified database, this one-system approach eliminates the risk

of loss or corruption that arises when data is transmitted and transcribed among multiple platforms.

Using such a system, investors can log in to a portal and submit the required information easily, quickly and just once, resulting in a much more efficient

*"A single-platform approach streamlines the entire investment lifecycle including reporting, investor communications, distributions and compliance."*

workflow. Onboarding questions can be more focused and manageable, sparing prospective investors from sorting

through a 100-page document. GPs then apply the information gathered to the subscription agreement, with the investor only needing to do a final review and digitally sign the document to complete the onboarding. In addition to its value for fundraising, such platforms also allow current

investors to retrieve investment information and documents anytime. With a comprehensive investment

management system, all investor and accounting information remains in the ecosystem, with no need to outsource to third parties. The resulting workflow reduces back-and-forth inquiries, making onboarding easier for all parties and reducing the GP's risk of losing a potential investor to frustration and factors that have nothing to do with the quality of the asset.

The single-platform, one-login approach **streamlines the entire investment lifecycle**, including reporting, **investor communications**, distributions and compliance.

**Cost savings, efficiency benefits**

Efficient workflows and the digitization of manual processes enabled over the past several years by a single platform for investment

*"A single platform for investment management reduces multiple investor logins and GPs' costs for maintaining disparate systems."*

management makes onboarding more efficient for prospective real estate investors. It also helps GPs by eliminating costs associated with maintaining multiple systems, nullifying the possibility of alienating potential new sources of funds, and reducing risk through enhanced data system security.



**The Yardi approach**

The Yardi Investment Suite avoids the deficiencies of relying on disparate investment, investor and accounting systems. The suite is a single connected platform that centralizes investment managers' communications with existing and prospective investors, automates the management of capital call and distribution notices, and improves collaboration on investment opportunities.

The Yardi Investment Suite also automates the subscription agreement process and makes it easy to publish reports and other documents. Confidence and efficiency come from the delivery of timely, responsive data through a secure portal rather than email.

Learn more about how the **Yardi® Investment Suite** serves as a single source of the truth for real estate investor and investment information.



# Thanks for downloading

For more information or any questions on Yardi Investment Management, contact us. We'd love to help!

Call us at (800) 866-1144 or email [sales@yardi.com](mailto:sales@yardi.com)  
Ask for Yardi Investment Suite



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