



## ZEDAK BACKSTAGE™

Backstage is a comprehensive Web solution for fee-based money management. Tailored for your enterprise, the system manages centralized research data and controls the implementation of due diligence requirements, automating document production and publication.

### Due Diligence & Compliance

- All due diligence requirements pre-programmed at setup.
- Footnotes and comments.
- Definitions.
- Disclaimer policies.
- Suitability rules.
- Compliance controls changes system-wide.
- Presentations automatically reflect published changes.
- Insured data quality and compliance.

### Data Maintenance

- Central data source available to your entire enterprise.
- Managers, funds, indices, and universes.
- Smooth integration with client database.
- Comprehensive fund and investment manager surveys.
- Data feeds from numerous sources including Informa, Morningstar, Lipper, Russell, Factset, Vestek, LehmanLive, NAREIT; composite performance, accounts, and assets for custody accounts.
- Performance imports and exports.
- Alternative products.
- Regular updates.
- Brand visibility management.
- Fund monitoring.
- Immediate turn-around for Manager Profiles.

### Workflow

- Automated workflow requires change review and approval.
- Central publication upon approval.
- Fund managers can maintain surveys safely.

### Audit Trail

- Records when data is changed and who changed it.
- Records every proposal made.
- Allows monitoring and review of up-to-the-minute sales activity.
- Segmented performance extends track records with full and appropriate disclosure.

### Reports & Publishing

- Mix and match dozens of text sections including:
  - Firm descriptions.
  - Risk-management policies.
  - Product and service descriptions.
  - Organizational, fund, manager, and personnel documents.
- Graphical analysis in research commentary.
- Mature, well-documented financial statistics and graphs targeted to your industry.
- Brand logos, fonts, colors, graphics, and pictures, as well as all internal legal and compliance requirements.
- Online and offline performance charting.
- Advanced statistical performance analytics.
- Publish in PDF, Word, or PowerPoint format.