

## CASE STUDY

PRIVATE EQUITY  
FIRM WITH CREDIT  
INVESTMENTSFREEING A CREDIT  
MANAGER TO FUNDRAISE

Tailored approach and deep expertise help private equity firm launch new credit strategy

## Our Client

The client is a private equity fund manager with over USD 25bn of assets under management and 30 years of successfully execution on traditional private equity investments on behalf of their large institutional limited partners.

## Initial Challenges

As competition grew in their traditional investment strategy for targeted middle market companies, the investment team decided to add a credit investment group to their team to diversify their product offering to current investors and attract new ones. The client struggled to add this new strategy with minimal capital investments on systems and platforms.

## Our Solution

Alter Domus developed a comprehensive service set that provided the much-needed infrastructure for the credit investment team. It allowed them to execute trades, receive the portfolio information, monitor performance, and provide the accounting team with financial reporting and audit support so the credit portfolios could be consumed by their firm-wide accounting/reporting platform.

## Roadblocks

Initially the client did not possess expertise on loan processes and required a great deal of guidance regarding middle office best practices and administrative reporting. Alter Domus worked in tandem with the client to increase their knowledge and adapt certain technologies to meet their specific needs. Additionally, Alter Domus placed employees in the client's offices to provide them with reassurance for their new strategy and a better understanding of their new service provider partnership.

## Results

With little to no additional investment in systems or staff, the client has now executed the launch of four funds and managed accounts totaling more than USD 1.5bn of additional investor capital, helping them build a successful track record for future marketing. Since then, the client has reached out to Alter Domus for insight and support when considering further fund launches or other credit strategies.

## AT A GLANCE

### Company Profile

Successful private equity firm launching new credit strategy

### Challenges

Client lacked the technology, systems, and expertise to fully execute on the new strategy

### Solution

Developed infrastructure for the credit investment team, deployed a range of credit services, and sent staff to client's offices

### Results

The client has since launched 4 funds and managed accounts totaling USD 1.5bn in investor capital and have built a successful track record for future marketing

## KEY CONTACTS

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