



Investor Onboarding Services



Suma Soft provides Business Process Management services for Real Estate Investment Trust companies as well as to Private Equity firms. Under these services, we cater to following different functions.

Investor Onboarding: Onboarding of new investor applications for REIT, 529s, Variable Annuities, Mutual Funds on CRMs such as Juniper Square, Sales Force, etc.

Due Diligence: Validation of investor documents for correctness and completeness. Co-ordinating with Sales Reps for getting discrepancies fixed.

Allocation: Updating Reservation Sheets, Calculation of Equity Percentage, Commission Amount, Commission Concession, Due Diligence Fees, etc.

Reporting: Creation of Estimated Settlement Statements and Submission of investor documentation to Qualified Intermediaries.

Settlement: Creation and Issue of Final Settlement Statements.

Escrow: Updating system with Escrow Closing details

Communication: Creation and Issue of Welcome Letters and sending out Portal Invitations to investors.



Suma Soft Background

Suma Soft Pvt Ltd is a leading Business Process Management services company offering Voice and Back Office Operations and Process Management Support for over 22 years. The Company is offering services to clients across multiple geographies including The United States of America, Canada, Europe and Asia. Our Business Process Management (BPM) Services coupled with Robotics Process Automation (RPA), Artificial Intelligent (AI), Machine Learning (ML) led automation capabilities have enabled customers to scale operations with improvement in Operational Efficiency, Customer Satisfaction and increase the bottom line.

Suma Soft Pvt Ltd has delivery centers are located within India and has grown to over 1900+ employees across these geographies. Being an ISO 9001:2015 (QMS) Certified and ISO 27001:2013 (ISMS) Certified company, we commit ourselves to highest levels of Quality and Information Security Standards.

Suma Soft's Services that steer businesses to success



Business Process Management

Suma Soft offers business process management services for Banking and Finance and Equity Markets, Logistics, Supply Chain, E-Commerce, etc.



Comprehensive Business Services

We offer business services such as Sales Force Implementation, Development, Customization Services, ServiceNow Services, Tech Support, Hyper Automation.



End to End Application Services

Comprehensive application development services that help businesses generate sustainable growth opportunities seamlessly. Our offerings include Next-gen App Development, Mobile App Development, Modernization, DevOps, Software Testing.



New Age Digital Services & Solutions

We offer AI/ML services, Data Science, Robotic Process Automation, Cloud Services, Enterprise Mobility, CRM, E-Learning, Collaboration.



How To Go About It?

If you wish to explore the option of availing our services, our Project Management Team and Transition Experts will be able to assist you with review of what can be externalized / outsourced, and the timelines associated with the same. Next steps to proceed with your requirements will be as follows.

Complimentary Session for Process Study and Identification of tasks that could be externalized.

Understanding your exact requirement - Walkthrough / Demo of Work.

Proposal from Suma Soft with Commercials

Contracting

Onboarding / Training

Go Live

Overall time span for all the above listed activities ranges from 2 weeks to 4 weeks.

Reach US

For USA

+1 281 764 1825
+1 281 468 7338

For India

+91 20 4013 0400

Suma Soft Fact File



20 Years of
Experience



ISO 27001:2013 Information Security
System Management (ISMS) Certified



Indian Computer Emergency Response Team
(CERT-In) Empanelled IT Security Auditor



Industry
Verticals Served



ISO 9001:2015 Quality Management
Systems (QMS) Certified



Standardisation Testing & Quality
Certification (STQC)
Empanelled Testing Company

Global Clientele



Suma Soft Inc

300 Delaware Ave.
Suite 210 #324, Wilmington
DE 1980

India HQ

Suma Soft Pvt. Ltd.
2nd Floor, Westend Icon, Westend Mall Complex,
Aundh, Pune - 411007, Maharashtra, India

Download Digital Brochure
& Socialize with us



sales@sumasoft.com



www.sumasoft.com

Copyright © 2000 - 2022 Suma Soft Pvt. Ltd.