



**MORE THAN 50%
OF NEW CLIENTS
COME FROM REFERRALS.**

WANT PROOF?

CASE STUDY:

College of the Holy Cross
Investment Office

The Challenge:

The College of Holy Cross was using a patchwork of five systems for research management, portfolio management and relationship management. They needed a solution that would lower the number of systems and the total annual software costs.

The Solution:

Backstop offered Holy Cross an industry-leading, highly-integrated solution that was scalable and flexible. Backstop enabled them to cease the use of four of the five systems and consolidate data and processing onto Backstop. As a result, Holy Cross will realize an annual software cost savings of approximately \$88,000.

The Feedback:

“The advantages Backstop gives us are vast – from managing investment due diligence in a centralized database, managing and reporting on complex liquidity terms to automatically syncing e-mails and contacts. Because everything is centralized, we’ve really been able to streamline our processes and operate much more efficiently.”

– Dan Ricciardi, Investment Officer, Holy Cross

Learn More

Contact a Backstop Sales Representative at

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