

FACT SHEET

COMPANY NAME

Assette

FOUNDED

1998

HEADQUARTERS

Boston, Massachusetts

EMPLOYEES

35

BUSINESS

Assette is a software company whose applications significantly increase the efficiency and scalability of marketing and client service areas at asset management firms. These improvements help firms accumulate and retain assets by re-allocating resources to proactive sales and client service activities.

MARKET

Assette primarily serves mid-market asset management firms with approximately \$1 billion to \$20 billion in assets under management.

PRODUCTS

Assette software makes it easy to integrate data from systems such as Advent and FactSet and create sales and client presentations, portfolio statements, and provide online account access to clients.

- Assette Presentations™ easily create customized sales and client meeting presentations in PowerPoint format.
- Assette Statements™ easily create and electronically deliver customized PDF account statements sent on a monthly or quarterly basis.
- Assette Portfolio Access™ provide a secure, easy-to-use web portal so investors can readily access customized account information and other important data.

KEY PERSONNEL

Thusith I. Mahanama, CEO

Marc S. Filipkowski,
Director of Sales and Business
Development

Mihindu J. Senanayake, Director of
Software Engineering and Quality
Assurance

CLIENTS

Roster of clients includes SEI (Oaks, PA), Boston Private Bank & Trust (Boston, MA), Kayne Anderson Rudnick (Los Angeles, CA), First Quadrant (Pasadena, CA), and Systematic Financial Management (Teaneck, NJ).

ADDRESS

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PHONE

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WEB SITE

www.assette.com

