



Chief Operating Officer Center ("COO Center") Supported by Investment Business Advisors, LLC

Providing “Best Practice” Advice to Alternative Firm CEOs, CIOs, COOs, CFOs and Functional Heads

Transparency

Workflow Documentation: Words & Graphics e.g., “Business Process Mapping”; “Process Excellence” (PEX)

Investment Function Workflows:

- Portfolio Management
- Research
- Risk Management
- Trading

Supporting Investment Business Function Workflows

Third-Party Provider Workflows

Establish & Disclose:

- **Fund Capacity**
 - Criteria
 - Rationale
- **Fund Closure**
 - Criteria
 - Rationale

***Note: Workflow Documentation Supports Achievement Of:**

- Transparency Objectives
- Effectiveness & Efficiency Objectives
- Alignment Objectives, and
- Development of Succession Planning, Development & Training Programs and Career Path Programs

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