

6 tips to optimize investor services and boost growth

Unlock clarity and control across the entire investor lifecycle



For fund managers and administrators, investor services offer a golden opportunity to delight clients and win business. But ditching inflexible legacy systems, slow manual processes and static reports is essential to staying competitive.

FIS® Investor Services Manager is a market-leading platform for transfer agency recordkeeping, shareholder registry and reporting that enables you to elevate operations and fast-track growth. Here are six ways our robust, cloud-enabled solution helps you service a global range of fund structures more efficiently, optimize the investor experience and keep investment strategies hard at work.



1. Handle diverse and complex fund types

Investor Services Manager provides a one-stop solution for a full range of asset classes, from daily dealing funds, hedge funds, private equity and private credit to infrastructure, distressed debt, special situations and semi-liquid hybrid funds. Register shareholders, calculate fees, value shares, process corporate actions, distribute dividends and report to investors.

- Broad asset coverage
- Unified fund management

2. Service private market investors

For private market funds, the solution offers specialist functionality for capital commitment tracking, waterfall calculations, LP and GP reporting, scenario planning, complex investor allocations and capital event processing. It also comes with a full set of workflows for semi-liquid funds.

- Complex allocations handled
- Specialist private market functionality



3. Deliver interactive reporting

Investor Services Manager integrates seamlessly with FIS® Digital Data Exchange to provide a digital self-service investor portal branded with your identity. Empower stakeholders to securely access reports on demand, get real-time insights and advanced visualizations. You also gain the wizard-driven ability to design reports from scratch without needing specialized technology skills.

- Self-service portal
- Real-time reporting

4. Streamline onboarding

Reduce friction in investor servicing by integrating with FIS® Life Cycle Manager to automate onboarding and regulatory compliance processes. Risk-based AML/KYC checks and advanced investor screening help you onboard new investors quickly and get your customer relationships off to the best start.

- Automated compliance checks
- Faster investor onboarding



5. Save time through automation

Improve the efficiency and scalability of investor services. Automate highly-complex fee calculations, calculate P&L at the investor level and process nearly 80% of transactions from end to end. Use APIs to integrate seamlessly with accounting systems and third-party solutions.

- Scalable investor services
- Seamless API integration

6. Advance and protect operations

Built-in AI agents answer questions about Investor Services Manager to help you navigate it more easily. Prompt AI assistants to unlock insights and produce reports on your behalf. Rest easy with enterprise-grade cybersecurity designed to keep your data safe and accessible only by authorized users.

- AI-driven insights
- Enterprise-grade cybersecurity



A smarter approach to investor relationships

As market pressures rise, investor servicing teams need to adapt quickly, reduce risk, manage obligations and deliver exceptional experiences with greater confidence. A cloud-enabled solution that unifies client and market data offers the transparency, flexibility and scalability to keep your client's investments working hard.

[Learn more](#)

Money at rest. Money in motion. Money at work.™

Our **technology** powers the global economy across the money lifecycle.



Money at rest

Unlock seamless integration and human-centric digital experiences while ensuring efficiency, stability, and compliance as your business grows.



Money in motion

Unlock liquidity and flow of funds by synchronizing transactions, payment systems, and financial networks without compromising speed or security.



Money at work

Unlock a cohesive financial ecosystem and insights for strategic decisions to expand operations while optimizing performance.