



C O N F L U E N C E ®

COMPANY FACT SHEET

Company Name

Confluence

Founded

1991

Description

The global investment management industry's leading provider of automated data management solutions.

Primary Differentiator

Confluence is the only provider of a comprehensive platform, known as the Unity® platform, which features a single, unified database and automates and consolidates all critical fund administration processes for asset managers—including collection, creation, confirmation, and delivery of investment product data. Results are lower costs, reduced risk, decreased reporting turnaround times, and the scalability to automate more processes without additional resources.

Leadership

- Mark Evans, Chairman and Chief Executive Officer
- Kirk Botula, President and Chief Operating Officer
- Karen Brownlee, Senior Vice President and General Counsel
- Michal Clements, Vice President of Global Sales
- Chris Evans, Senior Vice President and Chief Architect
- Dennis Farkos, Senior Vice President and Chief Financial Officer
- Dave Moore, Vice President of Professional Services
- Julian Naylor, Managing Director, Confluence International
- James "Skip" Smith, Vice President of Product Development
- Joan Tesla, Vice President of Marketing Communications
- Dan Torrens, Vice President of Client Service
- Frederick Winston, Vice President of Corporate Development

Ownership

Privately held

Clients

Confluence's solutions are used by 40 percent of the leading global investment managers, as well as service providers. The company's customers include 60 percent of U.S. mutual funds. The Unity® platform from Confluence addresses a wide range of problems from performance measurement to customized reporting for a full array of domestic and international managed investment products, including mutual funds, funds of funds, collective funds, separate accounts, and variable products, as well as hedge funds and other alternative investments.

Corporate Headquarters Address

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