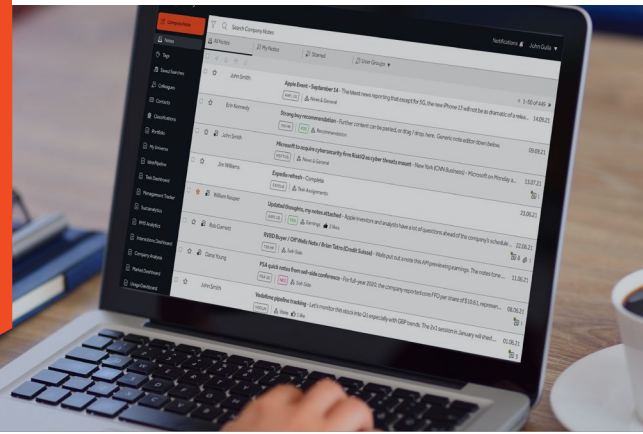




# Migrating to Verity

Painless. Seamless. Flawless.



Accelerate your transformation with our experienced team. No matter what your current system or how much data. Just notify your current provider — or connect us with the appropriate team — and we'll handle the rest.

## Any System

Our team migrates leading firms from both legacy and modern RMS platforms, DIY systems, and disparate 3rd party tools, such as Microsoft Office suite, shared drives, Evernote, and many others.

## Big or Small

Whether you have decades of research or are just starting up, we've handled small migrations and tackled major cutovers with hundreds of users and terabytes of data.

## 100% Covered

We partner with your team and execute 100%. You only need to send a single communication requesting your data from your current provider or the appropriate team member (IT, ops, etc.). We do the rest.

## What to Expect: No Interruptions, Day 1 Productivity

After you notify your current provider, we take every step to make sure your data and research is migrated securely. This process is coordinated with your internal technology teams while your investment teams keep working uninterrupted. Once completed, your team is ready on day one to take advantage of your new research management platform.

## Our 6-Step Process

### 1. Transfer

Receive/transfer data to secure location, following firm policies (e.g., fileserver/in-person).

### 2. Process

Process, decipher, and inspect all data and file structure.

### 3. Validate & Import

Validate data integrity. Complete MD5, file, and crosschecks for import. Create note, tags, and attach files.

### 4. Format Content

Ensure styling and properties from original system are intact. Overcome any legacy system shortcomings.

### 5. Customer Review

Submit migration hierarchy for customer review and approval.

### 6. Finalize & Handoff

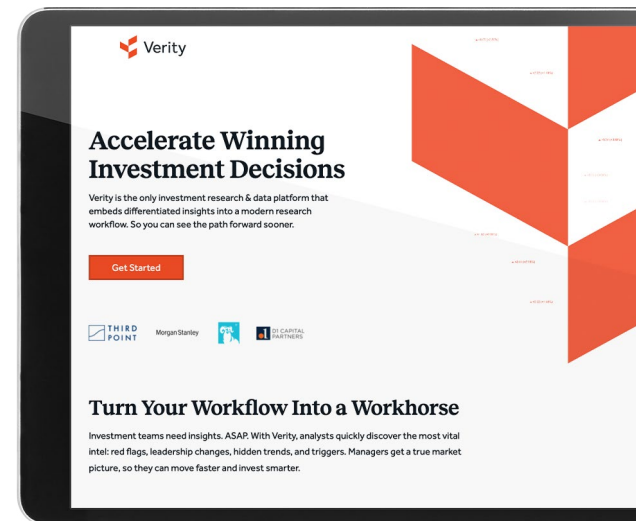
Initiate, finalize, and handoff migration. Your team is ready to go!

# Let's Get Started

With Verity, investment teams get more of what they need. Less of what they don't. Drive productivity, collaboration, and decision-making — without disrupting what sets you apart.

**Need more details?** We're happy to provide a customized technical document outlining your migration to Verity.

Visit [verityplatform.com/contact](https://verityplatform.com/contact) today to get started.



## About Verity

Verity is a leading provider of research management software, data and analytics delivered through a comprehensive platform to provide best-in-class workflow, portfolio monitoring, and idea generation solutions to more than 350 institutional investors globally. The platform is the result of a strategic merger between MackeyRMS and InsiderScore, sponsored by Resurgens Technology Partner. Between Mackey's cloud-based research platform and InsiderScore's data and analytics, the merged company delivers a powerful Platform combining data, analytics, and research management software solutions for investment teams conducting fundamental research for actively managed client portfolios. The company is headquartered in Boston, with offices in New York, Princeton, NJ, Seattle, London, and Sydney. For more information, visit [www.verityplatform.com](https://www.verityplatform.com).