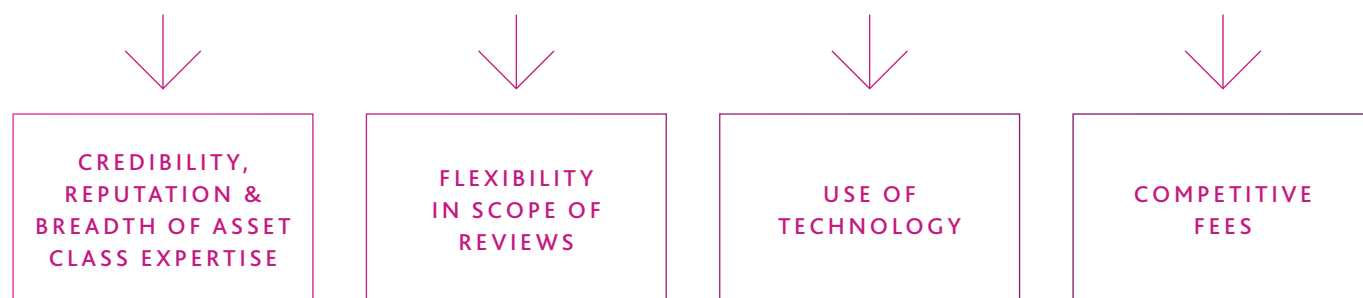


## ALLOCATOR ON-DEMAND ODD SERVICES SUMMARY

### INNOVATIVE, FLEXIBLE AND PRACTITIONER-LED OPERATIONAL DUE DILIGENCE ("ODD")



We provide allocators with unique, cost-effective support that fuses practitioner-led ODD with technology across private equity and credit, real estate, infrastructure, hedge, digital (crypto) assets, and long only.

perFORM offer allocators support that addresses:

- The need for flexibility in the scope of work - our clients tell us they have different needs and priorities depending on their own circumstances
- The need for a practitioner-led, technology-enabled ODD service at a lower price point for the established alternatives space

We offer an ODD service based on rigorous and independent reviews of operational risks. We apply a broad and deep question bank developed over more than 12 years to complete a qualitative and quantitative review.

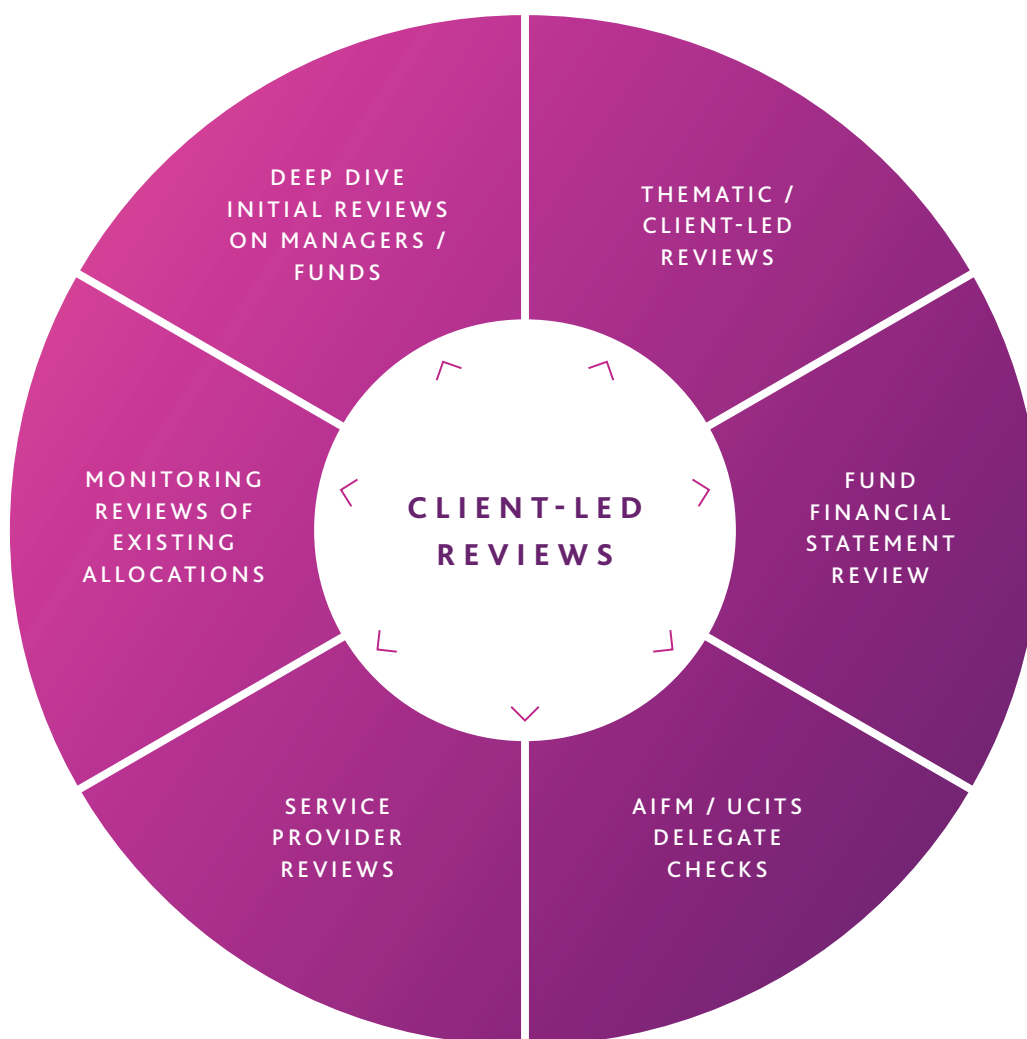
Clients access a summarised ODD report on the Investment Manager and / or investment vehicle(s), providing them with core data, essential flags, and an overall rating to enable informed decision-making.

perform responses and analysis are compared against:

- A set of operational risk standards modelled on real world events
- Regulatory standards/guidance
- Recognised best practice

We solve the conundrum of meeting regulator and asset owner expectations for better operational risk assessments whilst delivering at an affordable price point.

High profile cases, including Woodford, H2O, GAM, Madoff, Archegos and Greensill have turbo charged the need to perform robust and independent ODD.



## KEY CONTACTS

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Co-Head James Newman developed and led the Global ODD group at Barclays Wealth.

## ABOUT perfORM

# perfORM

## DUE DILIGENCE SERVICES

perfORM Due Diligence Services Limited (perfORM), a JTC Group company, is an independent and innovative Operational Due Diligence (ODD) provider to a diverse base of UK and international Allocators. perfORM's flexible ODD business model means they can be commissioned on behalf of Allocators, plus consult to Investment Managers (via ODD Therapy and Service Provider ODD).

Launched in 2019, perfORM was co-founded by Quentin Thom and James Newman as an ODD business providing solutions across private equity and credit, real estate, hedge, crypto, and long only. As one of the few practitioner led businesses headquartered in London, UK, perfORM continues to rapidly grow its client base, underpinned by its credibility, flexibility, pricing and use of technology.

Co-Head, James Newman, is a pioneer in the space, with over 15 years' experience in creating practices, developing standards and performing ODD. Co-head, Quentin Thom, is a business development professional with a strong background in ODD and an extensive senior network across Investment Managers, Allocators, service providers and trade associations.

perfORM is now considered leading in the field of crypto operational due diligence, with a large and fast growing coverage of Investment Managers and Funds, plus Digital Asset Service Providers (including exchanges, custodians and prime brokers).