


## TAX INNOVATION FOR PARTNERSHIPS



INVESTOR  
PORTAL

## Simple. Streamlined. Partnership made easy.

The **Xcelerate Investor Portal** is a unique component of the RSM client experience, providing a secure system to electronically distribute individual K-1s and other financial documents directly to investors. Investors who consent to receiving their documents electronically may access the portal to download their documents instead of waiting on a hard copy from the partnership. This next-generation solution puts your investors in control of how and when they receive the financial data they need.

Investor Portal: Documents		
<div>  <span>Investor Portal: Documents</span> <span>Powered By RSM</span> <span>BB</span> </div>		
File Name	Partnership	Investor
2019 WWS Investor 3 K-1.PDF	WWS	Bella Brunello
Demo Investors - Cover Page(WWS2) 3.PDF	WWS	Bella Brunello
Generic Shirts1.pdf	WWS	

## Benefits of the Xcelerate Investor Portal

- **Empower investors** to self-register and access their data 24/7 from anywhere on any device
- **Streamline investor receipt** of documents with one login for each investor and all of their K-1s from multiple investments clearly delineated
- **Distribute K-1s with maximum compatibility** from CCH ProFX, Axxess, and PartnerSight
- **Simplify distribution of K-1s to investors**, freeing up your time to focus on more valuable activities
- **Secure investor data with cloud-based technology** that has a full audit trail of platform interactions and multi-factor authentication features
- **Provide K-1s in a portal conveniently branded** for your business, to meet the expectations of investors



# The Xcelerate Investor Portal Difference



## EFFICIENT

Easily distribute K-1s to your investors regardless of the number of entities or organizational complexity. There is no limit to the number of K-1s you can distribute.



## SECURE

Have confidence that your investor information is safe in a cloud-based platform. All of your data is in one place, but each investor will see only what they need to see.



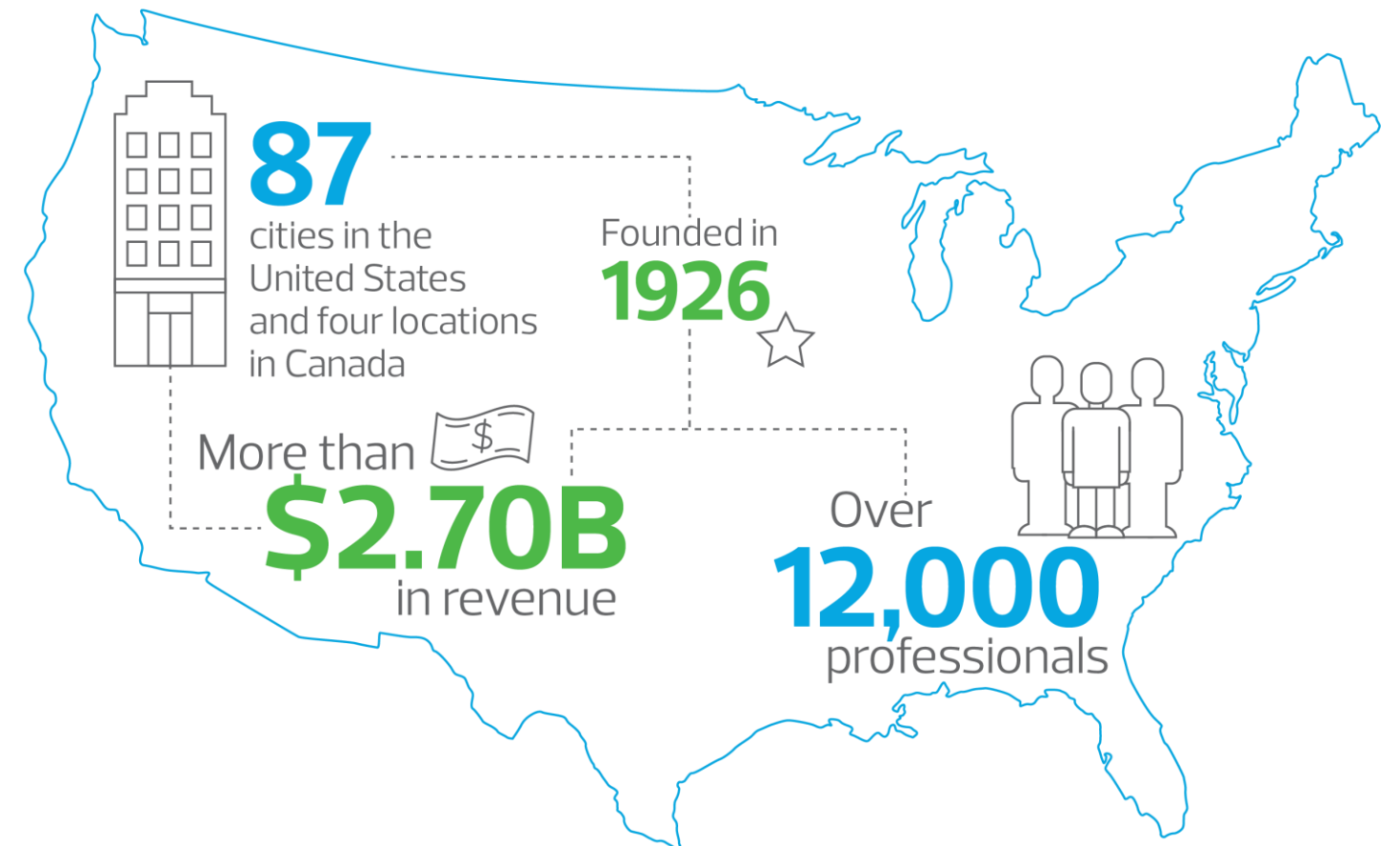
## FLEXIBLE

Send customized notifications to investors and distribute data other than K-1s by investor. No one-size-fits-all approach required



## SIMPLE

Provide your RSM advisor with the email addresses of your investors and reduce the burden of printing and mailing. Let RSM handle all of your setup and digital distribution.



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## Get in touch to learn more

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