



IVORY

Asset Management Solution

# Asset Management Solution

Collaborative. Flexible. Efficient.



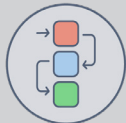
## DOCUMENTATION

Generate offer letters, end-of-term purchase orders and renewals



## REPORTING

Visualize residual exposure and upside by segmenting your portfolio however you like



## WORKFLOW

Configure workflows that scale as your business grows



## COMPLIANCE

Ensure adherence to internal compliance and regulatory policies

**Asset Management Solution** is an end-to-end, workflow-driven software application designed to make your organization more effective across its entire asset management operation – valuations, early and end-of-term dispositions, asset remarketing, and portfolio reporting.

As demands on asset managers become more complex in today's rapidly evolving technology environment, having robust real-time data and well-defined, streamlined and repeatable processes is imperative.

### CREATE RESIDUAL VALUES

Create and manage asset valuations used by sales, pricing and credit personnel, and others.

Access real-time asset valuation information when quoting, processing mid-term changes, buy-outs, credit memos and portfolio risk reviews.

### HANDLE DISPOSITIONS

Prepare multiple end-of-lease scenarios – renew, purchase or return – by utilizing powerful workflow, tracking and data-recording tools.

Track mid-term and end-of-term disposition information for assets – whether returned, purchased, renewed or renegotiated.

### REMARKET ASSETS

Order and access completed inspection reports, track returned assets, and assign assets for resale.

Utilize built-in remarketing and reselling features and calculate net profitability in a streamlined, unified system.

### ANALYZE PORTFOLIO PERFORMANCE

Build executive-level analyses detailing residual exposure and performance across an entire portfolio with the click of a button.

Easily segment across make, model, customer, geography, disposition code or in any other way.



The Asset Management Solution provides asset managers with an efficient workflow across all aspects of asset management. Thanks to AMS, asset managers are able to track business requests in real time, improve turnaround time, and produce detailed reports on demand. AMS also provides business security by incorporating internal controls to approval authority. The workflow also allows for improved collaboration between sales and asset management."

Mark Goldman  
VP, Equipment Finance Group  
Truist Bank

## FEATURES

### SALESFORCE CONNECTOR

Initiate a valuation request in Salesforce and process in AMS

### QUICK VIEW

View a snapshot of all key asset valuation data

### TASK MANAGEMENT

Track all activity and enable managers to assign tasks

### COMPARABLES

Utilize valuation data history to support residual assumptions

### NOTIFICATIONS

Send automated emails to task holders as workflow statuses change

### MATRICES

Structure and define risk management criteria for sales

### SCHEDULE OF AUTHORITY

Construct approval levels for valuations based on transaction size

### USER PERMISSIONS

Determine which user groups can enter, change or review data

## BENEFITS

### WIN MORE BUSINESS

Sophisticated, accurate residual value calculations drive greater profits

### INCREASE PROFITS

Analytical tools simplify tracking organizational goals and measuring KPI's

### PROTECT DATA

Authentication and role-based privileges ensure data integrity

### REDUCE EXPENSES

Logical and intuitive workflows eliminate labor-intensive, manual activities

### AVOID COSTLY MISTAKES

Repeatable processes guide the entire asset life cycle

### SIMPLIFY AUDITS

Embedded internal controls and detailed logs record all activity

### IMPROVE ASSET TURN

Multiple end-of-lease scenarios direct remarketing activities

### SATISFY CUSTOMERS

Quick turnarounds deliver an unmatched customer experience

