

Mirador Uses Solovis to Monitor Performance for Their Clients

Founded in 2015, Mirador is a financial reporting services firm that follows a model of client service coupled with technology to serve Family Offices, Wealth Managers and RIAs, Endowments, and Foundations. In total, Mirador currently works with hundreds of clients across the Americas, EMEA, and Asia Pacific, representing several hundred billion dollars in wealth.

When a client does not have the internal resources to meet their reporting needs, Mirador steps in to act as an extension of their team. By outsourcing their reporting needs, Mirador clients give themselves more bandwidth to focus on larger core initiatives.

We recently sat down with Kiruthika Nair, Assistant Vice President of Reporting, and Eddie O'Hara, Senior Associate of Reporting, to discuss their experience with Solovis Portfolio Analytics. Kiruthika and Eddie are responsible for managing the portfolio reporting of Mirador's Solovis clients. They have extensive experience with the Solovis platform, and their clients trust the duo to run all their key portfolio reports.

Solovis Makes Data Pulling and Visualization Less Complicated

According to Eddie, the main advantage of Solovis is how easy and effective it is at managing the portfolios of multi-generational family office clients. With Solovis, Eddie can easily pull and visualize the data for distinct entities that all live under the umbrella of one broad organization.

"We have one client who has 18 different entities within their family office. Solovis allows us to accurately break out the ownership percentage in each of the trusts that they collectively own. It's so much easier than how it used to be on Excel where I had to create multiple different models."

Kiruthika values the malleability of the data and reporting functions within Solovis, highlighting the simplicity of scrubbing the data in the platform. She enjoys being able to show exactly what data she wants and needs without having to fight with the system to represent it accurately. Additionally, she mentioned that alternative investments can sometimes be tricky, but Solovis makes the analysis seamless.



Kiruthika Nair
Assistant Vice President
of Reporting



Eddie O'Hara
Senior Associate of
Reporting

Working With the Solovis Team

Both Eddie and Kiruthika have enjoyed their ongoing relationship with the Solovis team who have supported Mirador in both servicing their clients' reporting needs and Mirador's own. When questions come up or reports need to be created or run, Eddie has no problem getting a response from the Solovis team in a timely manner.

"The people I've worked with on the team have been very helpful and responsive. They've been very patient with us as we continue to learn the system, and really promote knowledge sharing which is helpful."

What's Next?

As the Solovis-Mirador partnership continues to mature, they will continue to expand their resources for supporting asset owners. One recent development from Mirador is a bespoke offering for smaller, cost-conscious firms whereby Mirador handles all aspects of the Solovis experience, and the client simply receives portfolio performance reporting.

Additionally, as Solovis continues to develop new system enhancements, Eddie and Kiruthika will maintain their expertise, ensuring clients are always leveraging the latest innovations.

"With alternative investments, it's easy to track and reconcile them within the Solovis system."