



TIFF Investment Management Expands Partnership with SS&C to Address New SEC Form PF Reporting Requirements

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WINDSOR, Conn., Nov. 25, 2024 /PRNewswire/ -- [SS&C Technologies Holdings, Inc.](#) (Nasdaq: SSNC) today announced that TIFF Investment Management, a leading provider of custom advice and investment solutions for nonprofit organizations and other institutional clients, has expanded its relationship with SS&C to include Form PF reporting.



The investment advisory firm will outsource Form PF reporting to SS&C for all of TIFF's 40 + private funds subject to compliance with the regulation. This expansion comes at a critical time, as the SEC has introduced new and more stringent Form PF reporting requirements, increasing the complexity and urgency for private fund managers to ensure compliance. TIFF also leverages SS&C for tax services and manager research management.

"Form PF regulations are changing quickly, and we wanted to partner with an expert provider to ensure we stay ahead of the curve," said Christian Szautner, TIFF's Chief Compliance Officer. "SS&C has been a leader in Form PF compliance for years, coupling end-to-end compliance management technology with expert support. We look forward to working with SS&C to meet our regulatory obligations to the highest possible standard."

SS&C's comprehensive solution for Form PF compliance includes:

- Up-to-date explanation of the data required
- Data mapping and aggregation
- Validated Regulatory Book of Records
- Production of reports for review
- Direct filing with the Securities and Exchange Commission (SEC)

"Form PF reporting is now more complicated than ever with the SEC's new requirements. Private fund managers will have to collect and compile more data and dedicate more time, resources and brainpower to compliance," said Rob Stone, General Manager of Intelligent Automation and Analytics at SS&C Technologies. "Outsourcing this work to an expert provider such as SS&C significantly reduces the regulatory compliance burden on an organization. We look forward to supporting TIFF and other clients with this important work so they can get back to their primary business of finding alpha."

Learn more about SS&C Form PF reporting services [here](#).

About TIFF


For over 30 years, TIFF Investment Management has been a trusted partner, offering custom advice and investment solutions for nonprofit organizations and other institutional clients. Specializing in comprehensive Outsourced Chief Investment Officer (OCIO) and private markets solutions, we assist endowments, foundations, RIAs, family offices, and other institutional organizations in achieving their financial objectives and advancing their missions.

About SS&C Technologies

SS&C is a global provider of services and software for the financial services and healthcare industries. Founded in 1986, SS&C is headquartered in Windsor, Connecticut, and has offices around the world. Some 20,000 financial services and healthcare organizations, from the world's largest companies to small and mid-market firms, rely on SS&C for expertise, scale and technology.

Additional information about SS&C (Nasdaq: SSNC) is available at www.ssctech.com.

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