

Client Fact Sheet

Client



Overview

Intuitive Surgical, Inc.'s previous investment accounting system required many time-consuming manual activities. These processes were especially strenuous on their lean investment accounting and treasury team, whose workload increased significantly at month-end.

With Clearwater's automated reconciliation, Intuitive Surgical's team has control over their investment accounting data without the need for manual processes. Intuitive Surgical can view snapshots of their portfolio or detailed reports for a high-level or in-depth view of their holdings. This has enabled simplified accounting entry uploads into their ERP and automated SEC disclosure reporting. With Clearwater, Intuitive Surgical's team has been able to take back their workday and spend more time making strategic investment decisions.

Corporate Profile

Industry

- Healthcare Equipment and Services

Portfolio

- \$1 billion +
- Equities, corporate bonds, municipal bonds, agency discount bonds, and more

Reasons For Choosing Clearwater

- ✓ Automated reconciliation that eliminates manual processes
- ✓ Customized reports for faster period-end reporting (books closed on T+1)
- ✓ Timely, accurate reporting for both high-level and in-depth portfolio views
- ✓ Best-in-class client services team providing unlimited support and industry expertise



Customized reports provide control over data

We get so much value out of Clearwater. We have a lot of activity at month-end, so Clearwater's expertise has alleviated the majority of the burden and enabled us to automate many of our processes. Clearwater has been extremely helpful with speeding up everything for us.

Brian King
Treasurer, Intuitive Surgical, Inc.



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