

End-to-End Proxy Solution for Mutual Funds

At Alliance Advisors, we deliver a comprehensive, end-to-end proxy and shareholder communications solution—enabled by advanced technology, real-time data insights, and a team of experts. Our approach simplifies the proxy process while helping issuers drive meaningful shareholder engagement and maximize voter participation for open-end funds, ETFs and closed end funds including non-listed REITs and BDCs.



What is the value of an End-to-End Proxy Solution for my Company?

In today's fast-paced market, retail shareholders hold significant voting power, but reaching them efficiently requires scale, precision, and the right technology. Alliance Advisors combines decades of call campaign experience, mobile and email voting tools, with print, mail, and tabulation capabilities to ensure your message reaches retail shareholders effectively and cost-efficiently.

Our platform and worldwide team of multilingual agents enable high-volume outbound calling, Text-to-Vote solutions, and customized email voting campaigns. With millions of contacts made each year and robust security protocols, our proven system drives strong retail engagement and ensures successful shareholder meeting outcomes.

Program Highlights



Print and Distribution Management

- Scalable, integrated print and distribution capabilities
- Global reach with enhanced mail and e-delivery options
- Custom-branded materials tailored to your brand



Integrated Proxy Voting System

- Multi-channel voting access to meet shareholders where they are
- Highly branded and customized templates for email voting that can be personalized with a unique voting link for quick and secure voting.
- Innovative features like unique QR codes and Text-to-Vote capabilities for added convenience



Tabulation and Reporting

- Deep analytics and proxy vote modeling for strategic insights
- Real-time tabulation of digital and contact center votes
- Fully reconciled and audited vote reports for transparency and trust



Online Document Hosting

- Interactive, intuitive digital documents that enhance shareholder engagement
- Secure, branded web hosting that meets all regulatory standards



Virtual Shareholder Meetings

- Seamless virtual and hybrid meeting solutions accessible on any device
- Features include live video, presentations, voting, Q&A, and more



Solicitation Services

- Full-service solicitation support, including proxy advisory policies, institutional ownership analysis, and governance advisory services
- Modern omni-channel engagement tools to boost voter participation including expert live agents globally

Who is Alliance Advisors?

Alliance Advisors is the largest worldwide provider of shareholder focused services for publicly traded companies.

In 2024, we completed over 1,200 assignments, across 14 countries in North America, EMEA, LATAM & APAC, representing \$12 Trillion in stock market capitalization (largest client \$400 billion).

allianceadvisors.com

Contact us