

Dynamo & JVM Realty | A Client Success Story

Transforming Investor Experience and Operational Agility

JVM Realty, a leading **real estate investment** and management firm specializing in multifamily communities, faced growing challenges with its investor accounting and communication platform. The system lacked the flexibility to support complex accounting structures and failed to deliver the level of investor engagement JVM required, creating inefficiencies across workflows. To drive scalability and operational excellence, JVM conducted a rigorous six-month evaluation of ten leading solutions before selecting Dynamo for its proven market reputation, advanced configurability, and ability to meet the firm's evolving needs.



> *We have several very complex waterfalls, so we needed more than a demo—we needed proof. Dynamo was the only partner willing to build a true proof-of-concept, and the level of commitment separated them from every other provider we evaluated.*
>
> *— Mae Behm, VP Investor Relations*

The Before...

JVM had complex waterfalls and needed a professional investor portal to deliver the required output, and faced severe challenges in **three critical areas**:

1. User interface that restricted teams' ability to interact with the platform easily.
2. Lacked features to manage investor experience and track engagement.
3. Reliable client support team that was knowledgeable in JVM's business model.

Managing a growing portfolio of multifamily assets and a diverse investor base meant these limitations created significant operational inefficiencies for JVM.

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...and The After

By partnering with Dynamo for their **Fund Accounting** and **Investor Portal**, JVM Realty elevated investor management, transforming it from a fragmented, inefficient process into a streamlined, scalable, and highly responsive solution.

> *Dynamo embraced customizations — both in the portal and accounting environment — and gave us the flexibility to continue tailoring the platform as we grow.*
>
> *— Samantha Jachimczuk*
> *VP, Investor Accounting*



Four Key Outcomes & ROI

JVM Realty leveraged Dynamo to achieve these meaningful outcomes:

1. Time Savings

- ✓ 25% reduction in time spent tracking investment data activity and account updates with the ability for managers to review data changes themselves.
- ✓ Ongoing use of the system continues to reveal new ways to streamline processes.

2. Fundraising Opportunities

- ✓ Sales team gains valuable insights for better projections for investor readiness and engagement.

3. Accountability, Compliance & Security

- ✓ Audit log feature provides transparency, tracking who made changes and when.

4. Cost Savings

- ✓ Dynamo's ability to provide many features in one platform has helped reduce annual software cost.

Enhanced User Experience

- A sleek, intelligent interface that elevates internal team's efficiency.
- Dynamo's ability for admins to preview their investor experience configurations, ensuring an optimal client experience.
- Tailored layouts to reflect client brand and communication preferences.

Advanced Workflows and Reporting

- Management of intricate waterfall structures, providing precision and flexibility for complex distribution scenarios.
- Streamlined process for preferred returns, and SSRS-based reporting, delivering efficiency and accuracy across investor workflows.
- Custom reporting with an integrated report splitter for streamlined output.
- The Smart Attachment feature automatically attaches documents such as K-1s, to the correct investment accounts.
- Increased efficiency with the ability to configure views by individual user.

Trusted Partnership

- Established a collaborative partnership with **Dynamo's implementation team**, ensuring a smooth and tailored onboarding experience.
- Gained ongoing, responsive support that reinforces trust and enables continuous operational scalability.

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Success Unlocked

JVM, through the strategic adoption of Dynamo's Fund Accounting and Investor Portal modules, has streamlined its investor communications, enhanced accounting precision, and streamlined operational workflows. The platform's flexibility and support not only delivers scalability and efficiency, but also provides JVM Realty with the confidence to grow, backed by Dynamo's **unparalleled implementation expertise and ongoing support**.



More Dynamo Success Stories

Discover how top investment firms are transforming their workflows and driving remarkable results with Dynamo. Watch the Alternative Investments Client Video Series to gain valuable insights from real client experiences. You'll learn more about how Dynamo fuels success in the world of alternative investments.

#1 Investor Relationship Management Software

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About JVM Realty

JVM Realty is a real estate investment and property management company focused exclusively on multifamily communities across the Midwest. Founded in 1975, JVM manages a vertically integrated platform with a commitment to quality, integrity, and long-term performance. The company delivers exceptional living experiences for residents and consistent value for investors.

About Dynamo Software, Inc.

Dynamo gives alternatives investors a Performance Edge, empowering them to efficiently scale their firm to capitalize on the growing wave of private market opportunities. With the Dynamo Alternative Investment Platform, investors can now run a tightly integrated firm, putting all their data to work to accelerate operations across front, middle, and back office, unleashing teams to work smarter, and allowing leaders to make better investment decisions and scale their firm. Dynamo has a global footprint with operations across North America, EMEA, APAC, and UAE. For more information, please visit DynamoSoftware.com.

- Founded in 1998
- 1,000+ global clients
- $10T client AUM

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