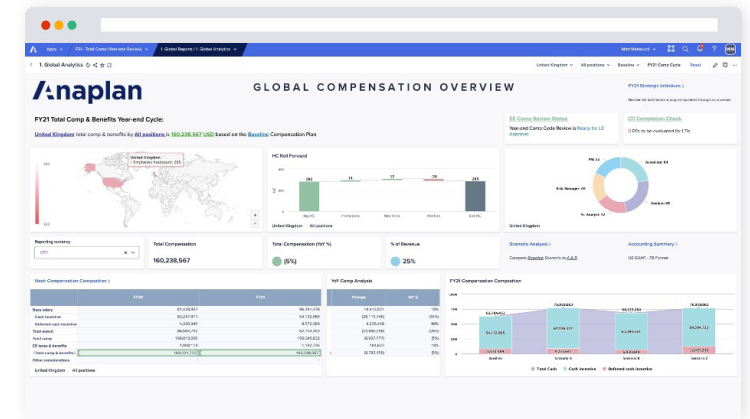# Anaplan

Anaplan for Hedge Fund Compensation

Increase transparency and streamline compensation calculations and reporting

As investor and regulatory scrutiny remains high, especially over fee transparency and reporting compensation costs, hedge funds and asset managers are feeling the pressure. Current compensation systems at most firms are outdated, inefficient, and difficult to maintain. They often rely on siloed tools and homegrown processes to source and map data for calculations across dozens or hundreds of portfolio managers (PMs) each with their own bespoke compensation structures.

To meet demands for greater transparency and respond to ever-changing compensation cycles, you need a way to move away from manual, high-touch workflows and streamline your compensation calculations and reporting.

There's a better way to plan

With Anaplan, you can streamline data collection and reconciliation and automate complex calculations so you can spend more time on high-value activities like managing your portfolio, talent strategy, and compensation guidance. Centralize all compensation-related data on one platform, creating a single source of truth.

Whether you're looking to capture employee agreements, enable firm-wide reporting, or forecast "what-if" scenarios, Anaplan provides PMs, business leaders, and front-office stakeholders with clear visibility into how personnel expenses impact your profit and loss (P&L).

Key benefits

Reduce operational risk. Create bespoke calculations enabling straight-through processing while maintaining SOC1 compliant controls framework with workflow and approval functionality. Ensure complete control with encrypted data security and robust administration configured for access management.

Increase visibility on full P&L and fund fees for investors. Move from weekly to daily snapshots to reduce reconciliation time and improve compensation accounting.

Improve data integrity with stronger internal controls and real-time insights. Use a single platform to provide planned inputs, evaluate employee performance, and communicate rewards.

Boost transparency with on-demand, self-service reporting capabilities. Streamline your reporting using centralized employee rules to increase compensation structure transparency.

Enhance decision-making with advanced "what-if" scenario modeling. Quickly analyze and back-test compensation plans to make more informed decisions and ensure compensation expenses align with your strategic goals.

Solution details

The Anaplan platform offers

Employee agreement and term sheets

- Model compensation scenarios based on various performance metrics and agreement terms to ensure compensation plans are aligned with fund performance and your strategic goals.

- Model various PM deal terms/structures and their financial implications, helping to design incentive plans that align with fund goals and performance.

- Integrate with your financial and tax systems to model the impact of different compensation and benefits packages on tax obligations.

Monthly accruals and payment scheduling

- Streamline the allocation of costs across different departments or cost centers based on predefined rules or actual usage to simplify accruals and payment processes.

- Model GAAP versus modified vesting schedules and compare their impact.

- Automatically generate journal entries for monthly accruals and payments to minimize errors.

- Manage payment service dates to ensure timely and accurate distributions.

- Integrate data directly with your general ledger to support accurate financial reporting and simplify reconciliation processes.

Deferred compensation

- Model complex vesting schedules and multi-year tranches, allowing for rapid simulation of various scenarios.

- Integrate and model retirement and pension benefits to more accurately forecast future liabilities and costs. Simulate different scenarios based on stock price movements.

- Model scenarios to assess the impact of offering more cash versus equity to enable better decision-making.

Expand with Anaplan for workforce planning so you can:

- Forecast attrition rates based on historical data and trends and various scenarios to anticipate workforce gaps and determine the timing and cost of backfills.

- Model organizational restructuring scenarios, helping to assess the financial and operational impact of talent decisions.

- Identify skill gaps, plan for role development, and align roles with business strategy.

- **"What-if" scenario and multi-dimensional modeling,** powered by our patented Hyperblock® calculation engine that produces ultra-fast calculations at unprecedented scale, **so you can react quickly to market changes.**

- Built-in dashboards, reporting, and analytics with data visualization, providing a **single source of truth** for business performance.

- **Collaborative and agile planning** across finance, operations, HR, and other business units.

- Best-in-class **security and compliance,** with role-based access control, user management, SSO support with SAML 2.0 compliance, and data encryption.

- **A highly extensible ecosystem** that collects and analyzes data in a single location using APIs, ETL connectors, and built-in integrations with other solutions.

About Anaplan

Anaplan transforms the way you see, plan, and lead your business. By dynamically connecting financial, strategic, and operational plans in real time, Anaplan gives you the power to anticipate change, address complexity, and move at market speed. Anaplan's Connected Planning platform lets you view and contextualize current performance, forecast future outcomes to fuel growth and mitigate risk, and optimize costs so you can make faster, more strategic decisions. Anaplan helps more than 2,400 market-leading customers in over 50 countries navigate their daily planning challenges with confidence.

To learn more, visit Anaplan.com

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