ORC Master Advisor Model

Integrated, End-to-End Due Diligence Solutions

ORC

Our Integrated Due Diligence Model

End-to-End Due Diligence Through One Relationship

ORC provides clients with access to a complete suite of specialist due diligence and advisory capabilities through a single relationship.

We deliver a fully integrated, end-to-end diligence program spanning **investment, operational, financial, commercial, tax and legal due diligence**, or select only the individual workstreams relevant to a specific mandate.

ORC coordinates the required specialist expertise, giving clients a flexible solution that can be tailored by **asset class, manager, fund, transaction or portfolio**.

Single Accountable Contracting Structure

CLIENT ↔ ORC **Master Advisor** ↔ **Affiliate 1** / **Affiliate 2** / **Affiliate 3**

A Complete Due Diligence Capability

ORC has established and mobilized this model on a live client engagement, bringing together specialist providers to deliver an integrated due diligence and advisory solution.

ORC	**Advisory:** Governance, operations, controls, compliance, service providers, data, continuity and operational risk. **Due Diligence:** ODD (Direct and Fund Investments).
FIRM A*	**Advisory:** Investment strategy, portfolio construction, manager assessment and investment process review. **Due Diligence:** IDD (Direct and Fund Investments).
FIRM B*	**Due Diligence:** Financial and Tax Due Diligence.
FIRM C*	**Due Diligence:** Legal Due Diligence.

**ORC is unable to name its partner firms due to confidentiality.*

This Approach Benefits Our Clients



Nigel Morriss
CEO

"Clients should be able to access the full range of specialist due diligence they need without building a fragmented provider model. ORC offers one relationship through which firms can commission an end-to-end review or select the individual capabilities relevant to the mandate."

End-to-End Support, or Individual Workstreams

One Integrated Solution

ORC can coordinate a comprehensive diligence program across:

Operational DD	**Investment DD**	**Commercial DD**
Tax DD	**Financial DD**	**Legal DD**

Or Select Only What Is Needed

Clients are not required to commission every due diligence discipline. The model allows individual workstreams or combinations of workstreams to be activated based on the investment, risk profile, internal capabilities and specific mandate requirements.

One workstream. Multiple disciplines. Or a complete end-to-end review.

Flexible, Interoperable and Non-Exclusive

ORC's model is intentionally flexible. Clients can use ORC's established specialist relationships or, where appropriate, incorporate their preferred provider into the wider diligence solution.

This means the service is built around the client's requirements, rather than a fixed consortium or predetermined scope.

The relevant expertise is assembled around the mandate, with ORC providing the single client relationship and coordinating delivery.

Value to Our Clients

Clients receive integrated outputs, clear escalation, coordinated advisory recommendations and a practical route from diligence findings to implementation. The model supports both pre-investment decision-making and post-investment advisory, including remediation planning, monitoring and manager institutionalization.

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