

Compliance that works for YOU

We've created a library of quick interactive demos to help you get comfortable with the new platform, no matter where you are in your deal process. Use this guide to get started in your new Finalis home.

Meet Your Dedicated Customer Success Team!

Change isn't always easy, but we've got you covered. If you have any questions, your Customer Success Manager is here to help!



Porsche Myles



Joe Gericis



Florencia Zunino



Agustina Tealdo Alizieri



Connor Eddy



Carson Savage



Philip Anderson

Don't know your Customer Success Manager? Contact Brian Pasalich, our Head of Customer Success at brian.pasalich@finalis.com.

Deal Process Overview

Everything you need to manage a deal from creation through closing on the Finalis platform.

Meet the Finalis Platform:

[Watch Teaser](#)



Resources

Located in the gray left navigation panel of the Finalis platform, the Resources menu gives you on-demand access to the Document Bank and Guides & Tutorials, including searchable documents, interactive demos, and training videos.

- Resources
- Document Bank
- View Firms
- My Firm Directory
- Guides & Tutorials



Sign in to Finalis

[Watch Demo](#)

Simply sign in using the same work email address and password you used on the previous Finalis platform.

- How to sign in using a password?
- How to sign in using a log in code?



Create a New Deal

[Watch Demo](#)

Create your first deal on the new platform by navigating to Deal Desk > My Deals in the left navigation panel.



Data Room

[Watch Demo](#)

Using a Finalis Data Room? Start here. Need access? Contact your Customer Success Manager, or share a link to your current external data room and send an invitation to compliance@finalis.com.

- How to create a Finalis Data Room?
- How to set granular permissions?
- How to bulk upload files?
- How to upload files into the Prep Room?
- How to directly upload folders into your Data Room?
- How to track investor activity?



Fee Sharing Agreement(s)

[Watch Demo](#)

Multiple internal and external FSAs can be associated with a single transaction.

- How to upload an internal FSA?
- How to upload an external FSA?
- How to link FSAs to a deal?



Engagement Letter

[Watch Demo](#)

Submit your Engagement Letter, leverage AI-assisted review, and complete signatures directly within the platform using embedded DocuSign.

- How to upload an engagement letter?
- How to send an Engagement Letter through DocUsign?

*AI-assisted reviews help identify potential issues before compliance review. AI features are not a substitute for human judgment.



Marketing Materials

[Watch Demo](#)

Submit marketing materials for compliance review.

- How to upload non-deal-related marketing materials?
- How to upload deal-related marketing materials?



Know Your Customer (KYC) / Know Your Business (KYB)

[Watch Demo](#)

Send and customize KYC/KYB requests directly from the platform.



Closing Documentation

[Watch Demo](#)

Upload and track closing documents for compliance review.



Invoice (Retainer & Closing)

[Watch Demo](#)

Get paid faster through integrated payments in the Finalis platform.