



Simplify investor onboarding from interest to commitment

A Yardi guide

TOPICS EXPLORED IN THIS YARDI EBOOK

- The cost of slow onboarding
- How Yardi simplifies the subscription journey
- Why centralized onboarding works better
- How Yardi's connectivity makes a difference
- Cost and efficiency benefits for investment firms
- The power of a single investor-to-property system
- How IR teams benefit from a connected platform



THE COST OF SLOW ONBOARDING

Attracting real estate investors with compelling opportunities is only half of the investment managers' job. Once prospects start the subscription process, **onboarding** becomes the make-or-break moment that determines whether interest turns into committed capital.

Friction here can be costly: a 2025 Fenergo survey found 70% of financial institutions globally **lost clients** due to slow onboarding. Preqin reports real estate fundraising **reached \$155B in 2025**, up from 2024 but still below the five-year average. In a market this competitive, firms can't afford to lose investors during onboarding.

With more investors in play and increased competition, firms need a streamlined, digital onboarding experience to guide investors to completion with minimal friction.

The SEC's 2020 expansion of the accredited investor definition widened the funnel as well. As access to private capital expanded, a higher volume of investors, often with smaller contributions, further compounded the onboarding burden.

Traditionally, subscription workflows relied on repeated back-and-forth to gather information and on disconnected systems to handle different stages of the process. These inefficiencies create friction and weaken investor confidence, sometimes to the point of **driving investors away**.

HOW YARDI SIMPLIFIES THE SUBSCRIPTION JOURNEY

To eliminate onboarding inefficiencies, many firms are turning to advanced **investor relations software**, like [Yardi Investment Suite](#).

Trusted by 375+ clients managing over 100,000 investors globally, the Yardi platform gives IR teams a single place for all steps in the process:

- 1. Securely capturing investor data:** Investors can fill in all the necessary information for the subscription agreement directly on the Yardi portal. IR teams receive audit-ready data in a single review queue, minimizing rework and turnaround time.
- 2. Centralizing tasks and documents:** Both investors and IR teams see a single checklist with disclosures and subscription materials in the Yardi portal. Fewer emails and calls, as well as version-controlled documents, keep both sides aligned.
- 3. Digitally signing the agreement:** Subscription agreements are signed electronically in the platform through built-in ySign, without the need for third-party tools.
- 4. Keeping investors informed:** After close, investors get instant access to the portal, where documents and investment metrics are stored for a consistent professional experience.

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CHRIS BARBIER
SENIOR DIRECTOR
Yardi

With Yardi, onboarding shifts from a fragmented, manual exercise to a structured, transparent workflow that accelerates subscriptions.



WHY CENTRALIZED ONBOARDING WORKS BETTER

While digitizing individual onboarding steps is essential for efficiency, the real impact comes from **centralizing the entire process** within one system. With [Yardi Investment Suite](#), onboarding runs from start to finish in a single workflow.

Investors complete subscription details and upload required documents directly to the Yardi platform. Information pre-fills across forms, reducing errors and rekeying while providing visibility into status and audit history. Data moves seamlessly without handoffs, and compliance stays in lockstep throughout.

Onboarding questions can be more focused and manageable, sparing prospective investors from sorting through a 100-page document. GPs use the gathered information to populate the agreement, requiring only a final review and digital signature from the investors to **complete onboarding**.

The centralized workflow reduces repetitive follow-ups and status inquiries, making onboarding easier for both GPs and investors. It also lowers the risk of losing potential investors due to delays or unnecessary friction unrelated to the asset's quality.

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SCOTT MCGINNESS
PRINCIPAL AND CFO
Cohen Asset Management

After adopting Yardi, our staff doesn't have to spend time assembling information from disparate sources. They can direct their energy to researching investment opportunities and strengthening client relationships.



HOW YARDI'S CONNECTIVITY MAKES A DIFFERENCE

After onboarding, investors get on-demand access to capital statements, subscription documents and performance reports in the centralized **Yardi portal**. With over **5.2 million documents published** through the platform, firms can confidently deliver information at scale while maintaining a consistent investor experience.

With Yardi, **investor and accounting data** live in one connected platform, eliminating disconnected tools and manual reconciliations. This helps GPs ensure data consistency across the entire investor lifecycle, from onboarding to reporting and capital transactions.

"Through the Yardi investment platform, you enter data once and it flows from subscription through reporting and distributions without rekeying, no conflicting versions. Statements and dashboards stay aligned, while your team gets real-time status and a full audit trail to resolve exceptions fast", says Alexander Lewis, Sales Director at Yardi.

By consolidating investment processes onto a **single platform** with one login, GPs gain greater control, auditability and efficiency throughout the investment lifecycle.

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JOE BIDDLE
DIRECTOR
OF INFORMATION TECHNOLOGY
ABR Capital Partners

Our investors, internal accountants and fund managers don't have to request data from us — they can easily get it online from the Yardi portal without going through anybody.



COST AND EFFICIENCY BENEFITS FOR INVESTMENT FIRMS

The Yardi single-platform approach goes beyond process efficiency. It **eliminates costs** associated with maintaining multiple systems and reduces risk through enhanced data system security, while enabling IR teams to handle a growing investor base without adding staff.

The full-service CRE firm Holladay Properties **grew its investor base** fivefold in five years without adding headcount by automating investor relations workflows with Yardi.

"Yardi investor relations software helps us with capital tracking, managing new investment opportunities and investor communications within a single connected solution that reduces work for our staff."

Wills Gardner, Director of Capital Planning, Holladay Properties

Manual onboarding workflows	Centralized onboarding with Yardi
Collecting data via Outlook threads and Excel trackers	Secure, consolidated digital data capture via Yardi portal
Disconnected systems: PDFs via email, signatures in DocuSign	End-to-end subscriptions with integrated ySign e-signature
Multiple investor logins across portals, data rooms, e-sign too	One investor portal login for all onboarding tasks
Subscription status tracked in spreadsheets	Real-time status and audit trail
Delayed closes from rekeying PDFs and missed steps	Fewer errors, faster closes and higher conversion

THE POWER OF A SINGLE INVESTOR-TO-PROPERTY SYSTEM

Yardi Investment Suite is the only real estate investment management solution **fully connected** with Yardi property management systems—**Voyager** and **Breeze Premier**. Investor, property and accounting data sync, keeping information consistent from asset to allocations.

Here's how this connected approach compares to common alternatives at each stage of the investor lifecycle.

⊗ Spreadsheets

Investor data scattered across emails and spreadsheets

Static PDFs, manual edits and signature chases

Investor activity and status tracked in spreadsheets

Capital calls and distributions compiled manually

⚠ Disconnected point solutions

Data reconciled across CRM, signature and data room tools

Separate apps for documents, forms and signatures

Fragmented updates across portals

More rekeying and reconciliation as volume grows

✔ Investor relations on Yardi

Audit-ready reports built on live accounting data

One portal for all documents and e-signature

Real-time status, routed approvals and full audit trail

System-driven capital calls and distributions



HOW IR TEAMS BENEFIT FROM A CONNECTED PLATFORM

For **investor relations teams**, the Yardi connected environment translates into faster, structured onboarding and improved reporting. Instead of toggling between disconnected tools to reconcile investor data with property-level accounting, IR teams work from a single source of truth that updates in real time.

This connectivity also gives IR teams the confidence to scale. As investor volume grows, the platform absorbs the complexity, routing approvals, publishing documents and generating statements without additional headcount or workarounds.

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JOE BIDDLE
DIRECTOR
OF INFORMATION TECHNOLOGY
ABR Capital Partners

The Yardi Investment Suite makes life easier for our real estate investment team, and thus our clients, by eliminating the need to integrate and validate data from multiple sources.

Discover how **Yardi® Investment Suite** helps you convert investor interest into committed capital more efficiently.

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