ForkJoin

Private Equity Portal

Fintech | Social Club of Investors | Investor Portal

We Advise. Develop. And Deliver.

ForkJoin

Platform for members-only community that shares knowledge and deal flow to build wealth through syndicated investing.

A newly formed private securities firm required an end-to-end web based application for investors built from scratch.

We developed a platform that empowers users to share knowledge and access deal flow, enabling wealth building through syndicated investments in alternative market opportunities. Our team handled the entire project lifecycle, from design and architecture to end-to-end development. The initial release was successfully deployed to production within five months, marking a significant milestone for our returning client.

Key features

Curated Investments: Explore carefully vetted deals from experts and opportunities shared by members.

Portfolio Management: Track transactions and assess portfolio performance.

Document Access: Securely manage legal documents in a dedicated data room.

Community Interaction: Connect with members invested in or exploring specific deals through built-in social features.

Knowledge Sharing & Events: Participate in events, read curated insights, and contribute expertise to the community.

Dashboard

The Dashboard is the central hub of the application and serves as the starting point for investors after completing all onboarding processes, including KYC verification, subscription payment, and profile setup. It provides a comprehensive overview tailored to the investor's activities and status.

For a new investor, the Dashboard offers:

- **A Clear Introduction:** Highlights the platform's key features and functionalities.
- **Quick Access to Investment Opportunities:** Direct links to curated deals tailored to the investor's interests.
- **Community Feed:** A dynamic stream of posts from the platform's members.
- **Upcoming Events:** A list of events relevant to the investor's interests and community.
- **Investor Groups:** An overview of groups the user is part of, facilitating collaboration and engagement.

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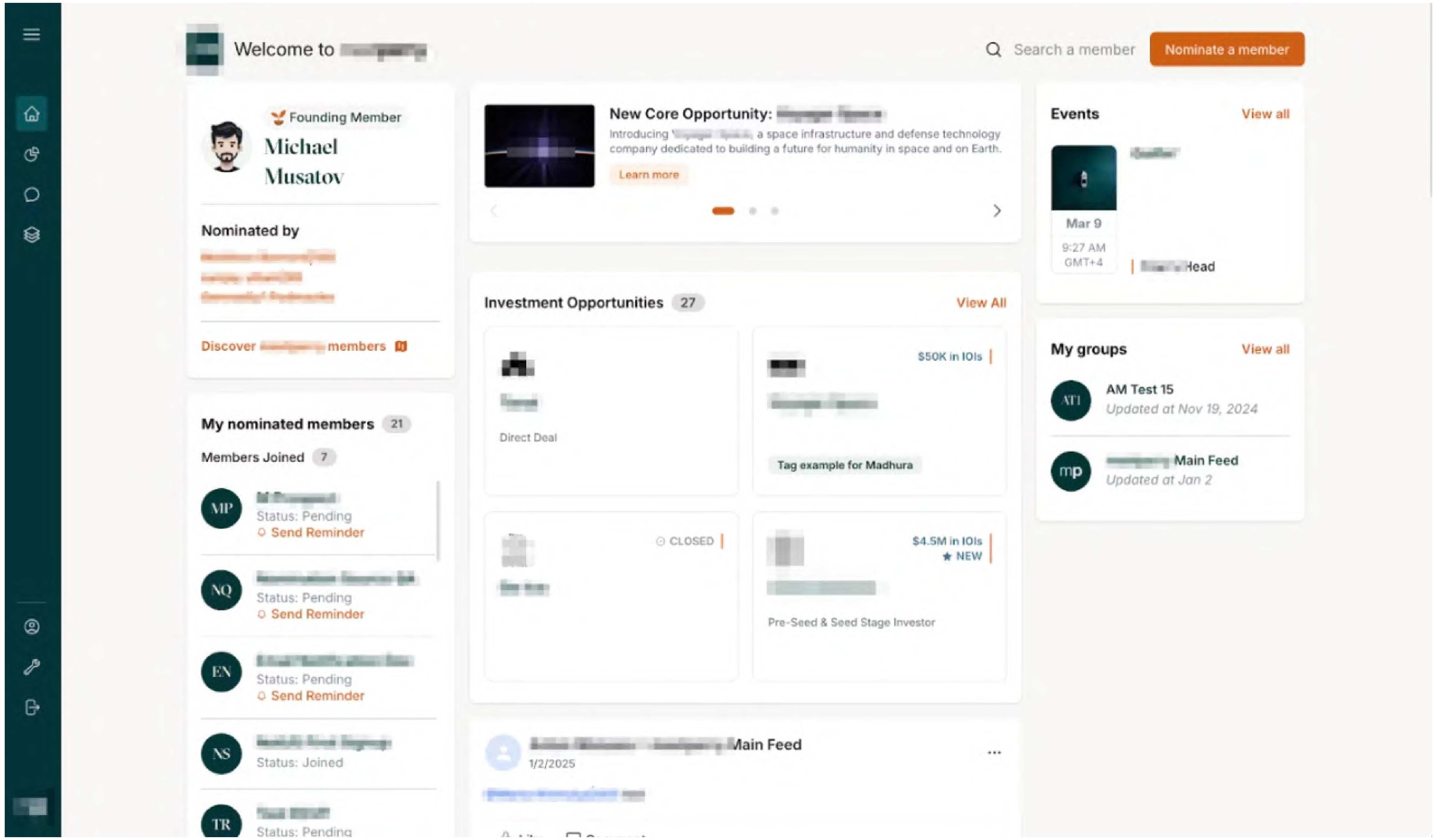
In the screenshot, the investor has already taken specific actions, which are reflected on the Dashboard:

- **Nominating a New Member:** Inviting peers to join the platform. A list of nominated members is displayed for easy reference.
- **Participating in a Community Event:** Engaging in networking and knowledge-sharing activities.



Exploring investment opportunities

The platform offers users the ability to invest in a variety of private deals categorized into segments such as Hedge Funds, Real Estate, and Private Equity, among others. Investment opportunities are divided into three main types:

- **Core Investments:** These are expertly curated opportunities prepared by the platform's specialists, ensuring high-quality deals vetted by industry experts.
- **Pipeline Investments:** Community-created opportunities that have garnered significant interest from members. These deals are actively collecting capital, reflecting their traction and validation within the community.
- **Off-Piste Investments:** Opportunities submitted by community members. These deals undergo careful validation and are shared to gauge interest within the community before potentially moving to the pipeline stage

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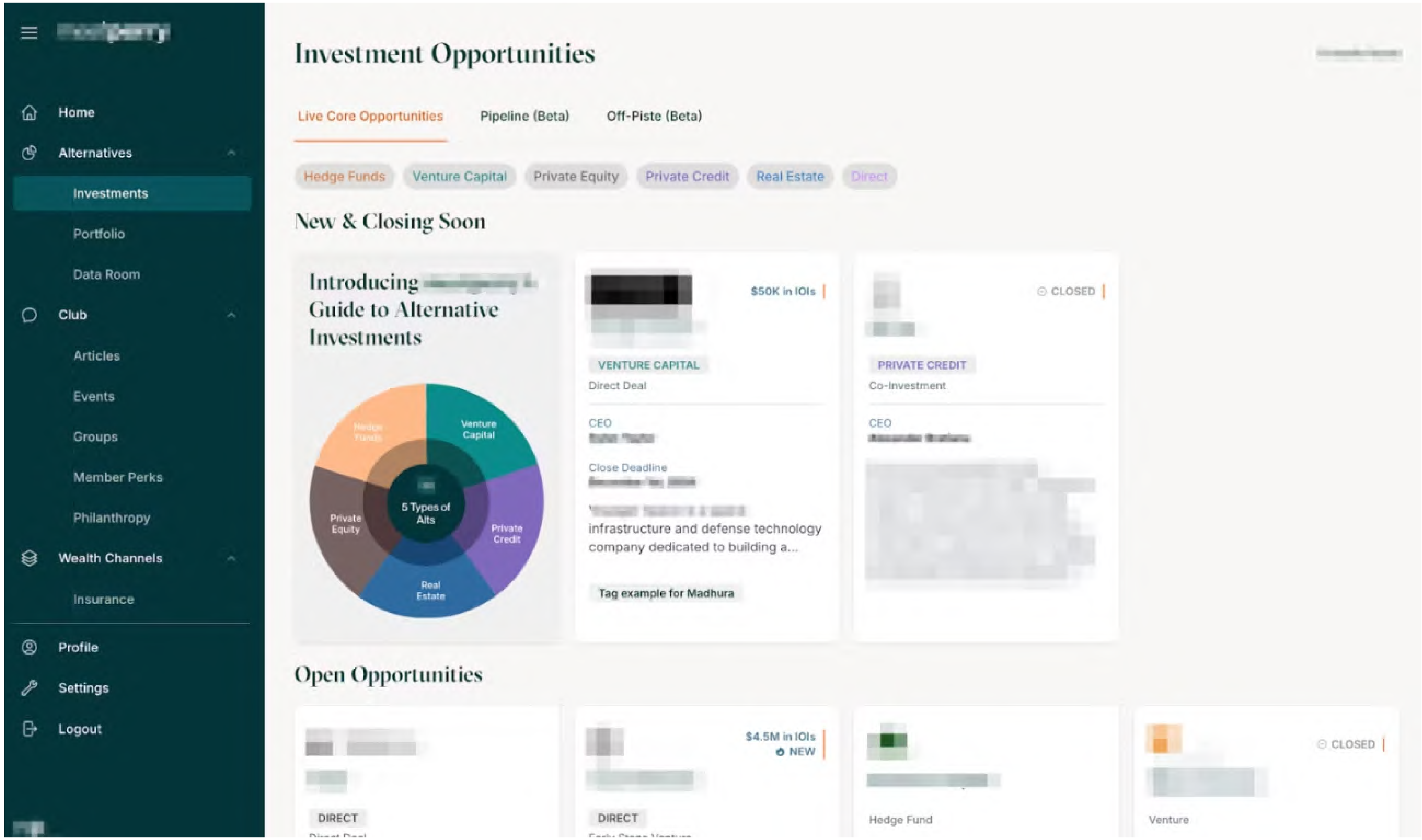
The screenshot below showcases how these opportunities are presented to investors.



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Indicating Interest

Investors can explore and review detailed information about each opportunity, including:

- **Sponsor and Leadership:** Key individuals or organizations managing the deal.
- **Referring Member:** The community member who introduced the deal.
- **Capacity and Fees:** Information about the available investment capacity and any associated costs.
- **Supporting Documentation:** Presentations, legal agreements, and other materials.

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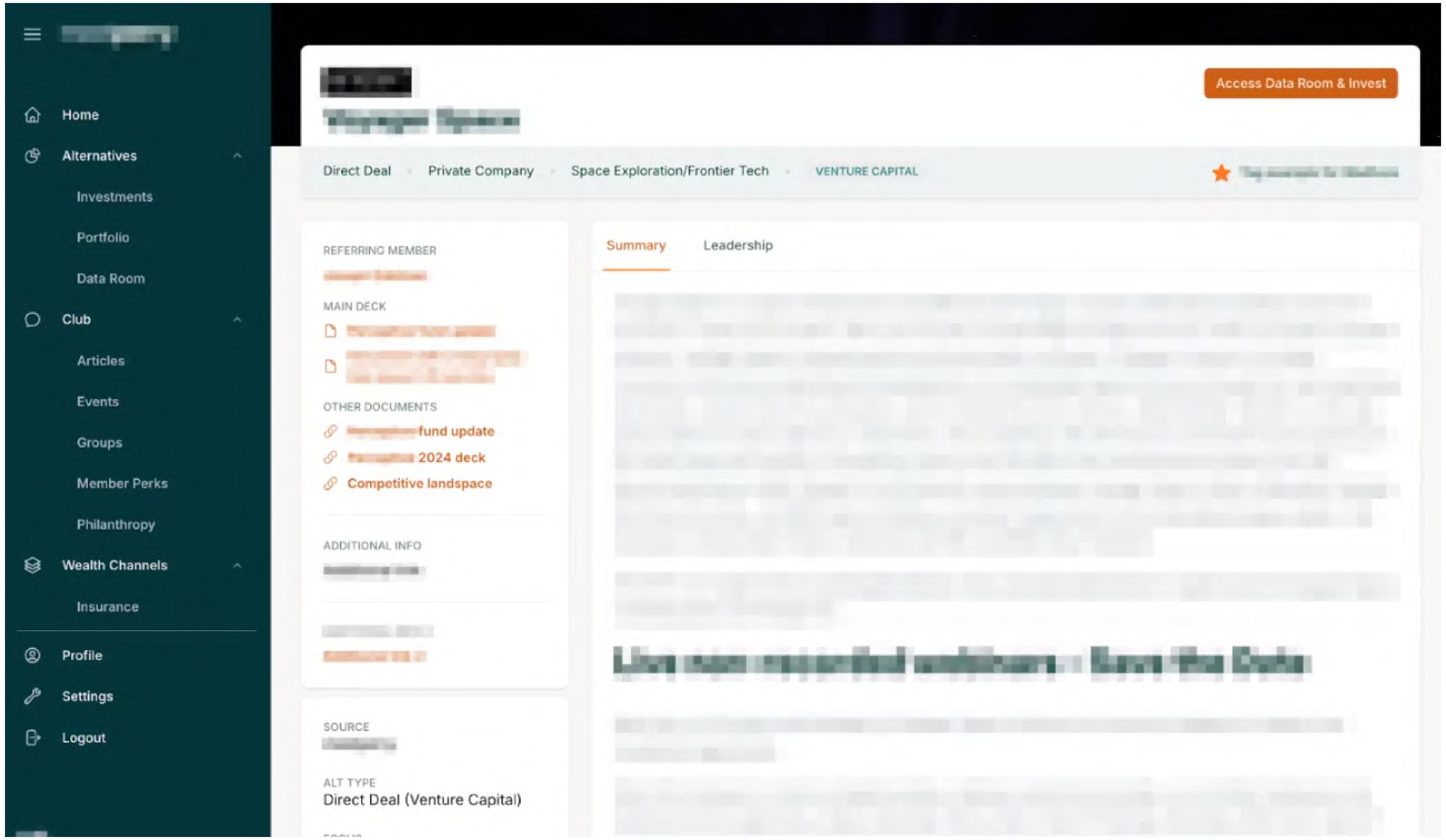
If an investor is interested in an opportunity, they can submit an Indication of Interest Amount, which will be reviewed by the deal management team to initiate further observation and processing.



Investor's Portfolio

The platform provides investors with robust tools to monitor and analyze their portfolio performance over time. Investors can:

- **Portfolio Structure:** View a comprehensive breakdown of their investments, including allocations across different categories and deal types.
- **Transactions History:** Observe detailed records of all transactions, ensuring transparency and traceability.
- **Valuation Dynamics:** Track the performance of investments over time with clear visualizations of value trends and changes.

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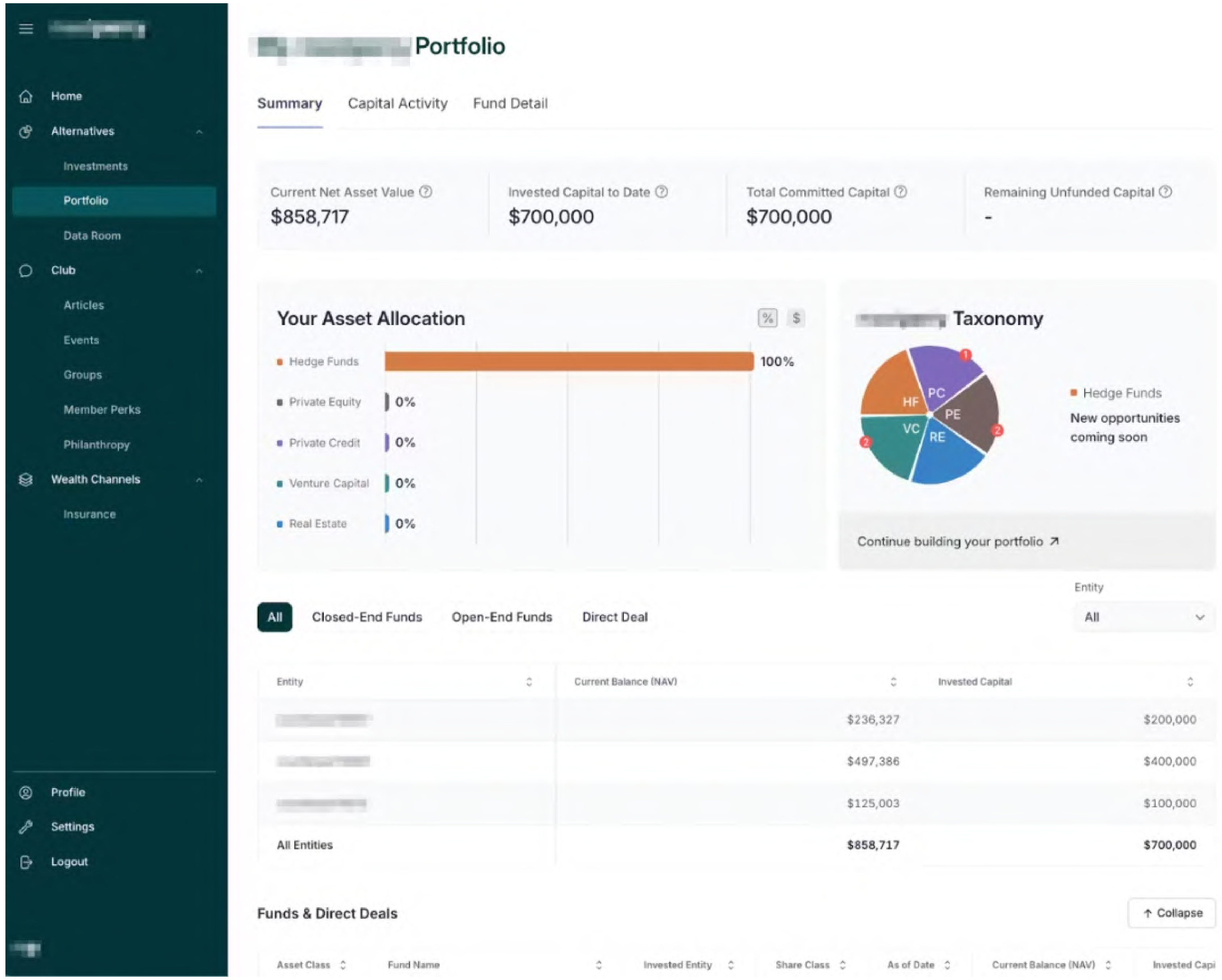
Filtering and Sorting

To enable detailed analysis, the platform beside sorting by any meaningful field offers flexible filtering:

- **Investment Taxonomy:** Filter investments by categories such as asset class or industry.
- **Deal Type:** Narrow results to specific deal structures, including:
  - Open-End Deals: Ongoing investments without a fixed end date.
  - Closed-End Deals: Investments with defined timeframes.
  - Direct Deals: Individual investments made without intermediaries.
- **Investment Entity:** Filter results by the entity managing or holding the investment.



Member discovery

It is designed to foster meaningful connections among investors, enabling collaboration and knowledge sharing within the platform's community. This feature empowers investors to discover like-minded members based on a variety of criteria, creating opportunities for networking, mentorship, and collective investment efforts. Investors can refine their search using multiple filters to identify members who align with their goals and interests:

- **Education:** Find members with specific academic backgrounds or degrees relevant to certain industries or investment areas.
- **Experience:** Search for professionals with expertise in specific fields, industries, or roles.
- **Interests:** Identify members who share similar investment interests, such as hedge funds, real estate, or private equity.
- **Location:** Discover members within a specific geographic area, facilitating in-person meetings or regional collaboration.

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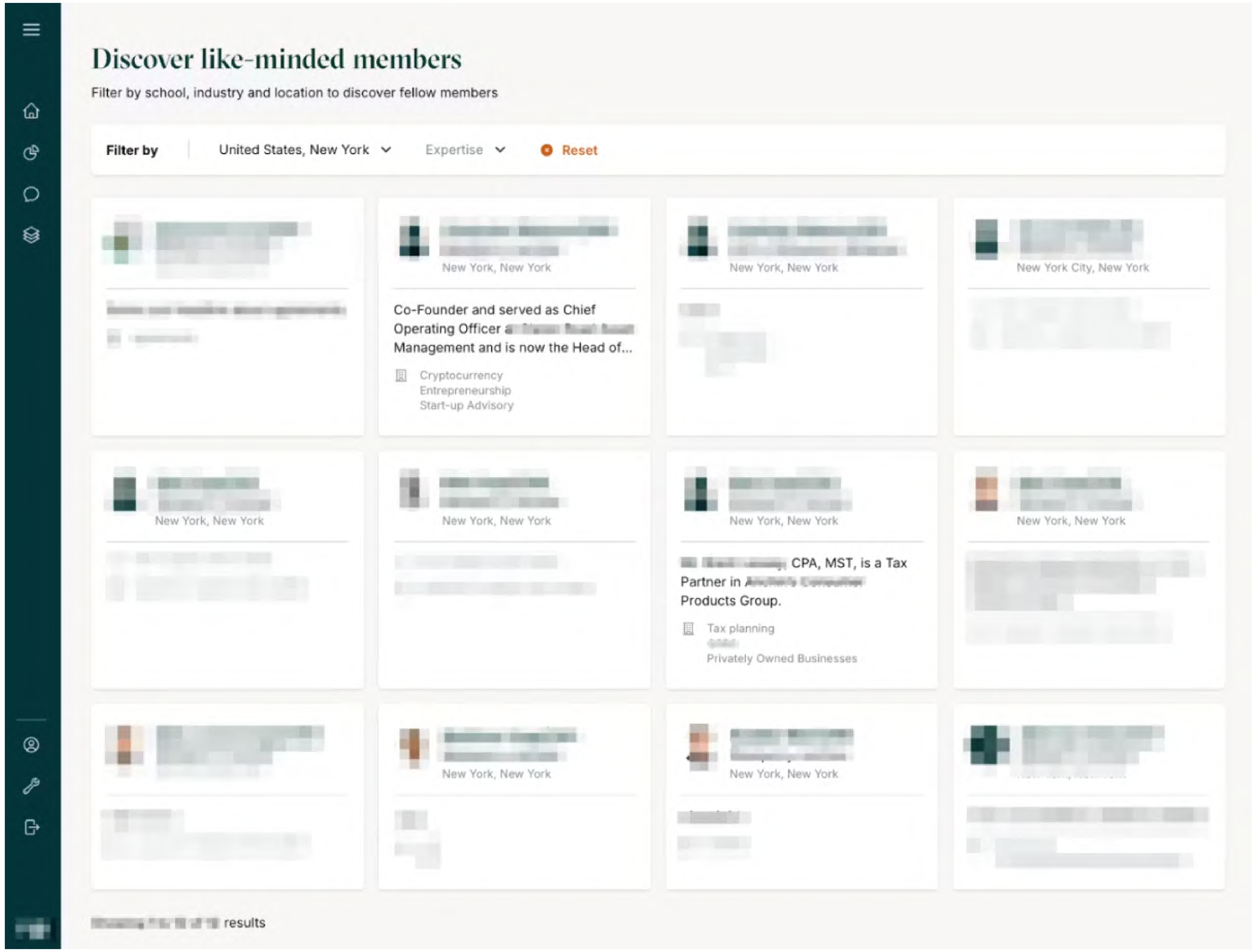
The platform leverages Google Vertex AI to provide intelligent search capabilities:

- Receive suggestions based on shared connections, mutual interests, or past collaboration on deals.
- Explore profiles with detailed summaries of members' expertise, past experiences, and community engagement.



Integrations

To enable these capabilities, we implemented several robust integrations:

- **Auth0:** Simplified application access and secure single sign-on (SSO).
- **Onfido:** Comprehensive Know Your Customer (KYC) verification.
- **Stripe:** Streamlined payment processing for member subscriptions.
- **Social+ (formerly Amity):** Enabling social features like communication, engagement, and networking.
- **Strapi:** Flexible content management for seamless updates and scalability.
- **Google Vertex AI:** Advanced AI-powered search for matching members with deals and optimizing discovery.
- **Courier:** Push notifications for real-time updates and engagement.

Auth0 onfido stripe socialplus
strapi Vertex AI Courier

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Timeline

1 Week	3 Months	6 Months	9 Months	12 Months
1	2	3	4	5
Lean Inception	**MVP**	**First Production Release**	**Infrastructure Improvement**	**Social Investing Features**
Product Vision, Personas & Features, User Journeys, MVP Canvas	Investor Registration, KYC, Catalogue of Investments	Application for Investment, Integration with Financial Data Providers, Investment Performance Analysis	Scaling migration from Digital Ocean to Google Cloud.	Ability to post News and other Data, Public/Private Group Chat Capabilities with Full Mobile Support

The project delivered an estimated **75% savings** vs. the cost of direct full time hires

The project was launched into production just 5 months after the start of development, and within the next 7 months, it successfully secured **over $10 million** in funding.

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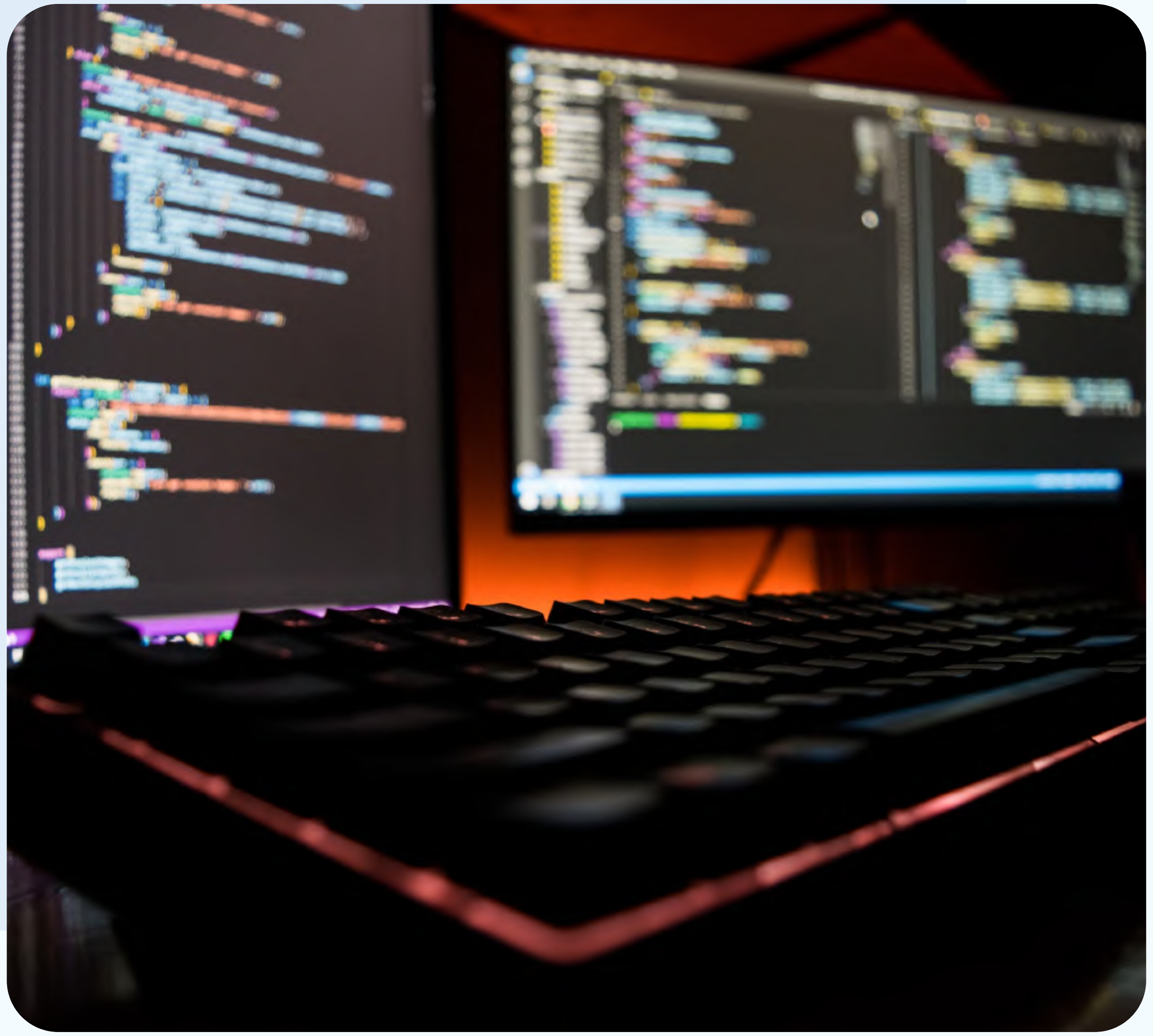


Technology and Processes Used for Delivery

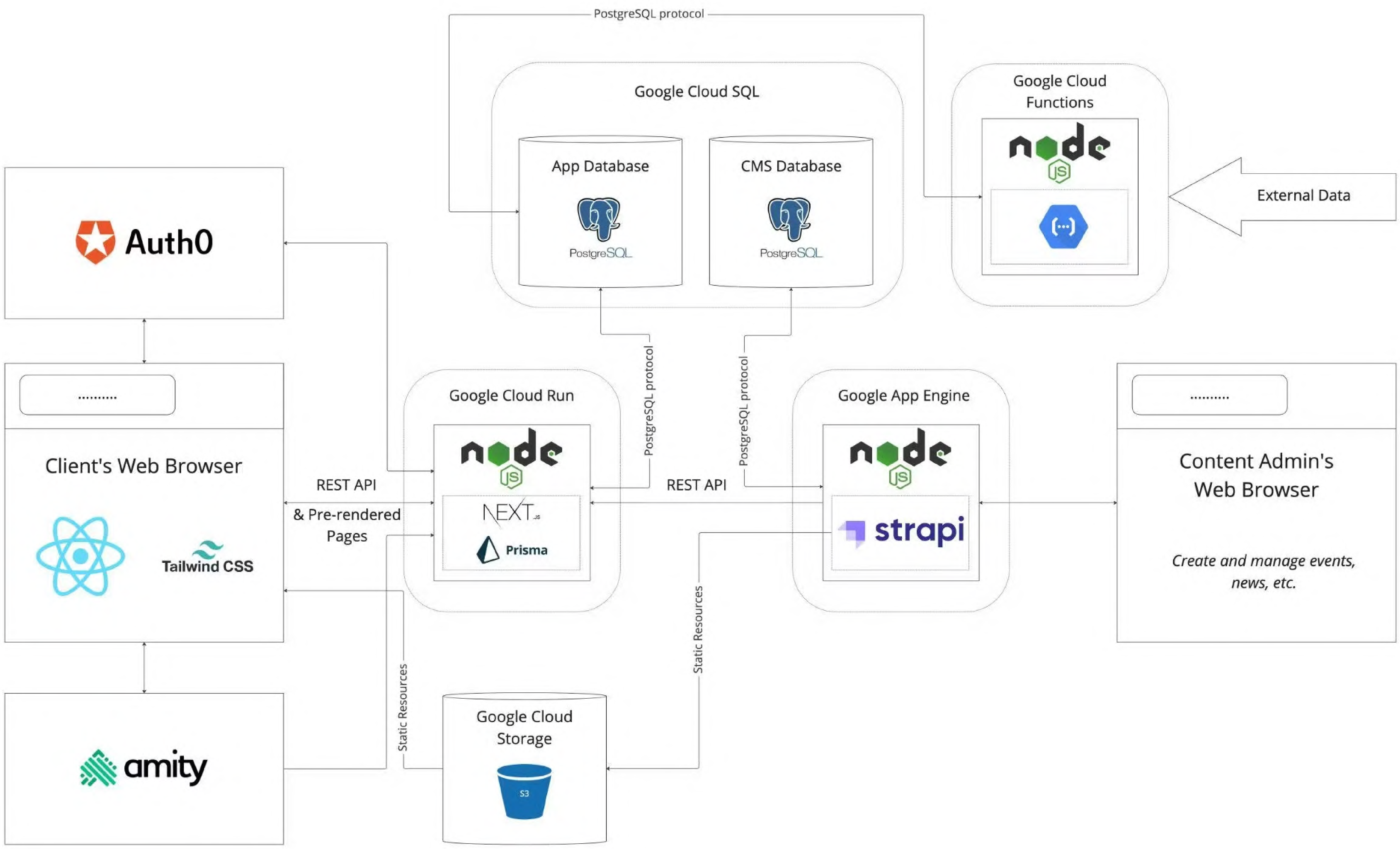
Technology

- Google Cloud Run and App Engine with Cloud SQL
- Self Managed Headless CMS for Editable Content
- NodeJS, NextJS, React, Tailwind
- Test Automation and test coverage threshold set to 85%

Process

- SCRUM with all ceremonies
- Cross-code view of all changes
- Automatic deployment to DEV environment and automated promotion to production

Architecture
with Google Cloud



Our Leadership Team

CEO

Michael Glazer

Michael has 25+ years experience in US Capital Markets. Over his career he held many different technical roles in Software Development, Solution Architecture and Delivery Management. Well-known key engagements included **FXall**, **Intercontinental Exchange** and **ENSO Financial** (Nex Group), and **GFT**.

CTO

Anton Moiseev

Anton has over 15 years experience with FinTech and Insurance projects, including leading insurance broker platform **SuranceBay**. Anton has a deep track record leading development teams and delivering production systems. Anton is also a Technical SME, contributing to open source projects, conducting webinars and co-authoring books.

Key open source creator for Dart.dev (later Flutter.dev)
Key architect and designer for https://www.surancebay.com/.
Notable **Manning Publications**:
TypeScript Quickly
Angular Development with TypeScript, Second Edition
Angular 2 Development with TypeScript

VP of Engineering

Michael Musatov

Michael is a Lead Development Manager with 15+ years of experience working on successful projects in Insurance, including leading insurance broker platform **SuranceBay**, FinTech and Telecommunications industries. Michael has strong skills in designing and implementing robust and simple solutions to solve complex real-life business cases with a rich variety of technologies including both Java and .NET platforms.

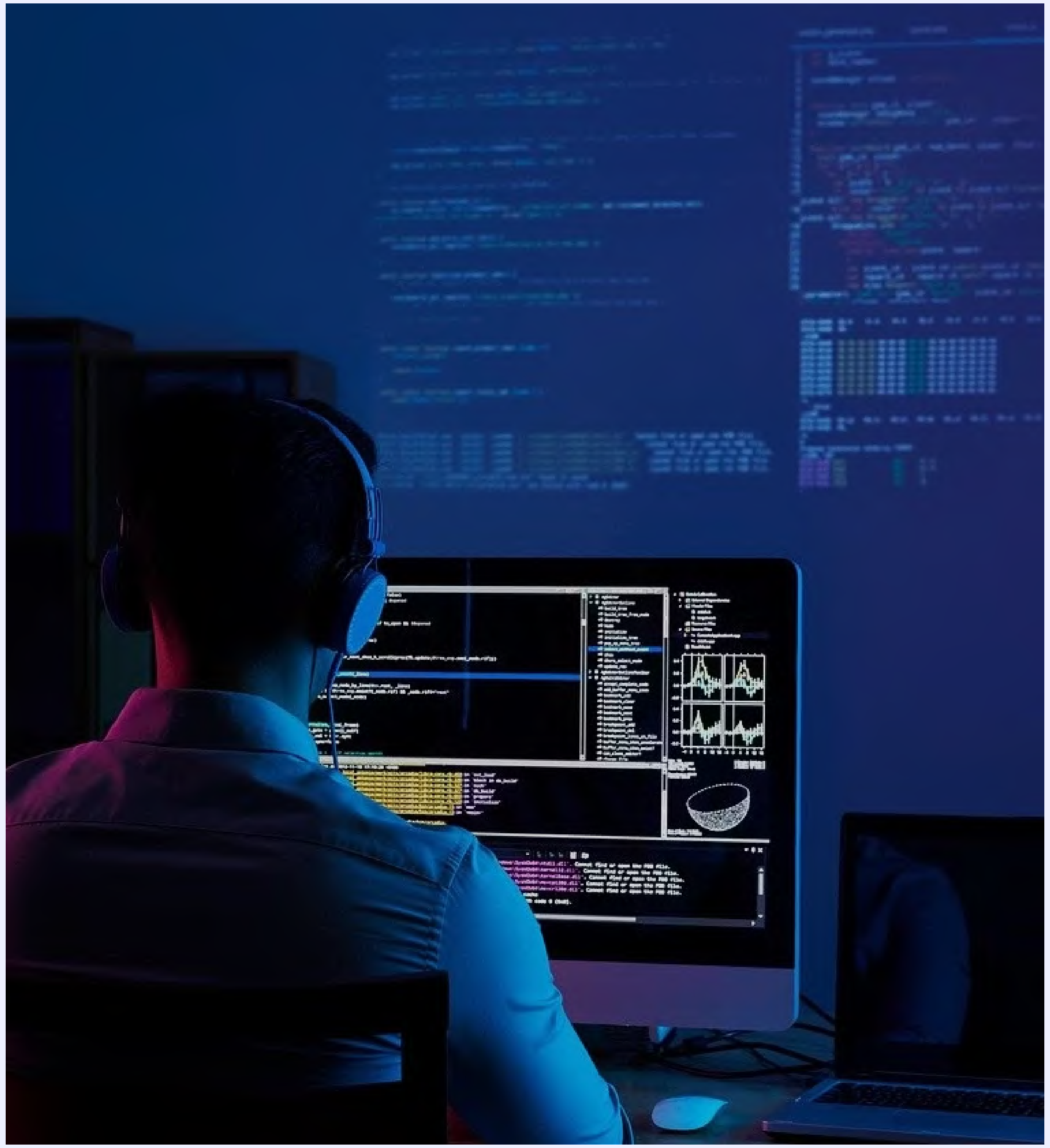
- MCPD: Windows Developer
- MCPD: Web Developer
- MCPD: Windows Azure Developer
- MCTS: .NET Framework, Web Applications
- MCTS: .Net Framework, Data Access
- MCTS: .NET Framework, Service Communication

Platonic

meetperry

SURANCEBAY
INSURANCE. SIMPLIFIED.

References



Capital Markets - ENSO Financial Analytics acquired by NEX (part of ICAP) and by Hazeltree

Functionality: Web Workflow, Reporting, Compliance, Market Data

Voted "Most Innovative Hedge Fund Platform" by Hedge Fund Magazine 2 years in a Row

Private Equity - Meetpery

Functionality: Web & Mobile Investor's Portal, Fund Transfer, Reporting

Assets Tokenization - Platonic (former Symbiont)

Functionality: Financial services with Platonic's enterprise-grade L1 blockchain.

Quantitative Trading - Epsilon Services

Functionality: Rich Real-Time Trading, Position Management

Telecom - REW - Tampa-based consulting firm focused on telecommunications

Functionality: Billing, SMS Notification, Customer Portals for large Users

ForkJoin

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