The Zaf Group: Elevating the Investor Experience With FundCentre™ Reporting

Overview

The Zaf Group (TZG) is a family office specializing in acquiring and growing founder-led, family-owned businesses with a long-term investment philosophy. Given its lean, globally distributed team and a highly relationship-driven investor base, maintaining secure, professional investor communications is critical to the firm's growth.

As TZG continued to expand its operations, the firm needed a more institutionalized approach to managing investor communications while maintaining the personalized relationships that define its model.

Situation

Previously, TZG's investor communications were coordinated manually, often by the firm's founder. While this approach was manageable with a small group of limited partners (LPs), it was not sustainable to support a growing investor base. Ad-hoc document sharing was fragmented and difficult to track, offering limited security controls and little to no visibility into who was engaging with marketing materials and fund updates.

TZG needed a centralized, secure platform to store and share sensitive documents while transitioning from manual, unstructured communication processes. At the same time, the firm needed to deliver a more consistent, scalable and professional investor experience to its LP base. "With a small group of investors, communication was very personal and

Client Success Story

The Zaf Group

Industry:
Investor communications

Enhanced document management:
Secure, centralized investor communications platform

Global GP-LP community:
Institutional-quality experience for a growing LP base

Platform flexibility:
Scalable infrastructure aligned with long-term investment strategy

"Intralinks was a logical next step in our development"

— Fidan Nikolovski, The Zaf Group

direct," says Fidan Nikolovski, marketing manager at TZG. "But as we grow, we recognize the need for a more structured and secure way to manage those interactions."

Solution

TZG chose FundCentre Reporting as its end-to-end platform for investor communications. The decision was driven by the platform's strong reputation and widespread adoption across the private market ecosystem, its bank-grade security and the team's prior experience using Intralinks VDRPro™.

Implementation was straightforward and efficient. As the primary user, Nikolovski led the setup, configuring investor permissions, structuring folder hierarchies and customizing the platform to align with TZG's workflows. "The platform was intuitive and easy to configure," Nikolovski says. "We were able to get up and running quickly and tailor it to fit how we communicate with our investors."

In addition to reducing the investor relations (IR) team's administrative burden, FundCentre significantly enhanced TZG's investor experience. Using FundCentre's landing page feature, the team created a simplified, website-style experience that presents the firm's strategy, founder background, portfolio companies and values. This provides a more structured and professional introduction that highlights the firm's value proposition for current and future investors.

Result

Within the first month of adoption, TZG established a seamless and secure investor communication process. Sensitive documents are now managed within a centralized environment, reducing reliance on informal channels and improving overall control.
"The primary advantage for us is security and presenting a more professional way of communicating with our investors," Nikolovski says. "It gives us confidence as we continue to grow."

FundCentre is also enabling a more consistent and professional approach to investor engagement. As TZG looks to grow its LP base, the platform provides a robust infrastructure that allows the firm to scale efficiently without adding operational complexity. Communications are now more streamlined and organized, and FundCentre's advanced tracking and reporting features make it easy to gauge investor interest during due diligence.

Looking ahead

TZG's investment approach is centered on long-term ownership, with a strategy of acquiring businesses and holding them in perpetuity. This model requires a disciplined and growth-ready approach to investor communication.

By implementing Intralinks early in its development, TZG has taken a critical step toward institutionalizing its operations while maintaining its relationship-driven culture. The platform enables the firm to combine professionalism and scalability with the personalized approach that defines its investor relationships.

"Intralinks was a logical next step in our development," Nikolovski adds. "It allows us to communicate in a more structured, secure and professional way as we evolve." With Intralinks supporting its investor communication strategy, TZG is well-positioned to grow while maintaining the discipline, professionalism and long-term focus that set the firm apart.

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