



CASE STUDY

Private Equity Managers — Transitioning from Self-Administration to Scalable, Independent Infrastructure

Challenge

As private equity platforms scale and institutionalise, managers increasingly encounter limitations in operating models that were designed for earlier stages of growth. Approaches such as self-administration or reliance on large, institutional service providers can become less effective as fund structures grow more complex, investor demands increase and regulatory obligations evolve.

For many managers now working with Waystone, what had worked in the early years began to expose operational constraints. Internal systems were resource-intensive to maintain, key-person risk increased and reporting flexibility was limited as Limited Partner requirements became more sophisticated. In several cases, inconsistent service levels and a lack of continuity at larger providers further reinforced the need for change.

Any move to a new administration model needed to preserve historical data integrity, ensure continuity for investors and avoid disruption to ongoing fund operations.

Solution

Waystone works with its private equity clients to deliver a structured transition from self-administration or constrained service models to a fully outsourced, institutional-grade administration framework. Historical fund data is migrated onto Waystone's private equity platform, with validation processes applied to ensure continuity in calculations and reporting.

Waystone assumes responsibility for end-to-end fund administration, including fund accounting, investor services, capital calls and distributions, regulatory reporting and secure investor reporting solutions. Flexible, client-centric service models ensure reporting can adapt as investor and fund requirements evolve.

Importantly, managers are able to institutionalise operations and strengthen governance frameworks without disrupting existing investor relationships or ongoing fund activity.

Results

Waystone's private equity clients achieved:

- Reduced operational risk and key-person dependency
- Improved efficiency through scalable technology and specialist expertise
- Greater reporting flexibility and independence for Limited Partners
- Lower internal burden, allowing teams to focus on investment activity and fund growth
- Scalable operational infrastructure capable of supporting future funds, strategies and investor requirements.

Waystone's combination of private equity expertise, stable teams and flexible infrastructure enabled these managers to professionalise their operations while retaining agility.

If you have any questions regarding the themes raised in this case study, please contact your usual Waystone representative or our team via the button below. You can also find more insights from Waystone's experts and join our mailing list on our [News & Events page](#).

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