Third-party portfolio — relationships and services

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Fonds Térial — fictional investment vehicle, fully delegated structure · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. The values below are the ones the engine actually read from the case: they recompute, they are not transcribed.

What the register links

Business object	What it carries
convention de délégation de gestion	owner, contract, service supported, review date
contrat d'administration de fonds	owner, contract, service supported, review date
registre des prestataires essentiels	owner, contract, service supported, review date
plan de continuité du teneur de registre	owner, contract, service supported, review date

The segment rules, applied as written

Rule

Une structure sans salarié dépend de bout en bout de ses délégataires : chaque niveau de délégation est une ligne du registre, pas une note de bas de page.
Le prestataire du prestataire est une quatrième partie : il se nomme, ou il se déclare inconnu.
L'absence d'équipe interne ne dispense d'aucune évaluation : elle rend la revue contradictoire plus nécessaire, pas moins.

Counting unit for this file: **véhicules gérés**.

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