

California CLASS SB 272 Enterprise Software Disclosure List - 11.2024

Product	Vendor	Purpose	Data Types	Custodian	Frequency Collected	Frequency Updated
Asana	Asana	Marketing, compliance and HR workflows		Marketing	Daily	Daily
BambooHR	BambooHR	Human resources management		Human Resources	Daily	Daily
Bloomberg Professional	Bloomberg	Trading platform, market data		Portfolio Management	Daily	Daily
CAPS	CAPS, Inc.	GIPS compliance reporting		Compliance	Daily	Daily
Polaris	Indus Valley Partners	Enterprise Data Management		Information Technology	Daily	Daily
Microsoft 365 Apps For Enterprise	Microsoft	Email, spreadsheet, word processing, diagramming		Information Technology	Daily	Daily
Microsoft Office 365	Microsoft	Email, IdP, Cloud storage		Information Technology	Daily	Daily
Microsoft Azure	Microsoft	Infrastructure-as-a-Service		Information Technology	Daily	Daily
Microsoft SharePoint	Microsoft	File storage		Information Technology	Daily	Daily
On-Premise File Cluster	Microsoft	File storage		Information Technology	Daily	Daily
Capital IQ	S&P Global	Market data		Credit	Daily	Daily
Global Market Intelligence	S&P Global	Market data		Credit	Daily	Daily
Intacct	Sage Group	Accounting and financial management		Finance	Daily	Daily
Salesforce	Salesforce	CRM		Sales	Daily	Daily
Pardot	Salesforce	Marketing communications		Marketing	Daily	Daily
ServiceNow	ServiceNow	Information technology service management		Information Technology	Daily	Daily
uTransact	Ultimus Fund Solutions	Fund accounting, participant requests and statements		Client Services	Daily	Daily