

VISTA EXCHANGE



May Review

At Vista, we are honored to work with exceptional people that understand the significant opportunity we have to drive lasting change – for our investors, communities and beyond – through enterprise software. We know that the Vista team – inside the firm and throughout the portfolio – is paramount to our shared success. In May, several of our team members shared thought leadership content on topics from diversity and inclusion to hiring best practices. We share key insights from these engagements below.

INVESTING IN ENTERPRISE SOFTWARE

May was another active month of transactions, with notable exits in Zego and Advicent. Zego, acquired by the Foundation Fund in 2017, announced its sale to Global Payments (NYSE: GPN). Additionally, Advicent, acquired by Vista's Flagship Fund in November of 2011, was acquired by InvestCloud with the goal of creating the world's most comprehensive financial planning solution. We wish both companies lasting success during their next phase of growth.

MAY 2021 ANNOUNCED TRANSACTIONS



DRIVING DIVERSITY, EQUITY & INCLUSION FORWARD

In a recent byline in New Private Markets, Vista's Director of Diversity and Inclusion, Khalida Ali, shared her thoughts on Diversity, Equity and Inclusion in the private equity industry and how a focus on "conscious inclusion" is the key to creating a diverse and equitable work culture.

"Ultimately, constructing inclusive environments is the only way to truly diversify organizations and create lasting change."

Khalida Ali, Director of Diversity and Inclusion, Vista

Additionally, as a member of the [Corporate Call to Action](#), we were proud to join 17 other financial institutions committing to a measurable plan to improve economic and racial equity. The commitments include:

- Diversifying Suppliers and Business Partners
- Investing in Underserved Communities
- Building a Diverse Talent Pipeline
- Improving Workforce Equity and Transparency

We were also honored to announce our role serving on Code.org's [Industry Advisory Council](#) in support of the expansion of its Java programming curriculum, which is designed to increase student access, participation and diversity in the software engineering field.

CULTIVATING & CELEBRATING LEADERSHIP

This month, we hosted our annual Vista Women's Leadership Summit. Over the course of two days, women from across the firm listened to internal and external speakers in sessions designed to inspire How We Get to Next - cultivating the skills, mindset and practices to realize aspirations and ambitions.

WATCH BELOW FOR KEY TAKEAWAYS FROM OUR SPEAKERS



Additionally, we were proud to celebrate Simon Paris, CEO of Vista company Finastra, who was named No. 2 of the Top 50 Financial Technology CEOs of 2021 by The Financial Technology Report. Learn more about the recognition [here](#).

CONTINUING OUR COMMITMENT TO STAKEHOLDERS

SeattleforIndia is helping transport and distribute lifesaving medical oxygen to those in critical need in India to combat the surge in COVID-19. We thank [Sunny Gupta, CEO of Apptio](#), for his leadership in spearheading this initiative, bringing together the tech community in Seattle and beyond to save lives. Vista is proud to support these efforts.

INSIGHTFUL CONVERSATIONS

On a recent episode of Unfettered Conversations With A and Z, [Robert F. Smith](#), Vista's Founder, Chairman and CEO, joined [Marc Andreessen](#) and [Ben Horowitz](#), Co-Founders and General Partners at Andreessen Horowitz, to discuss Robert's career journey, his success in enterprise software and his philanthropic focus.

Click [here](#) to listen to key insights on the technology industry, investment and building a business.

[David Breach](#), Vista's Chief Operating Officer and Chief Legal Officer, was recently featured on Finding Your Synchronous Fit, a podcast series by [Kingsley Gate Partners, LLC](#). During the session, he shared key insights about recruiting, interviewing and the importance of cultivating diverse talent as well as critical leadership traits for successful organizations.

Click [here](#) to listen to the podcast.

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