# Business Process Outsourcing for Financial Services

## Transforming Financial Service Accounting & Financial Management

trusted CFO solutions

# How Does It Feel To Manage Your Company?

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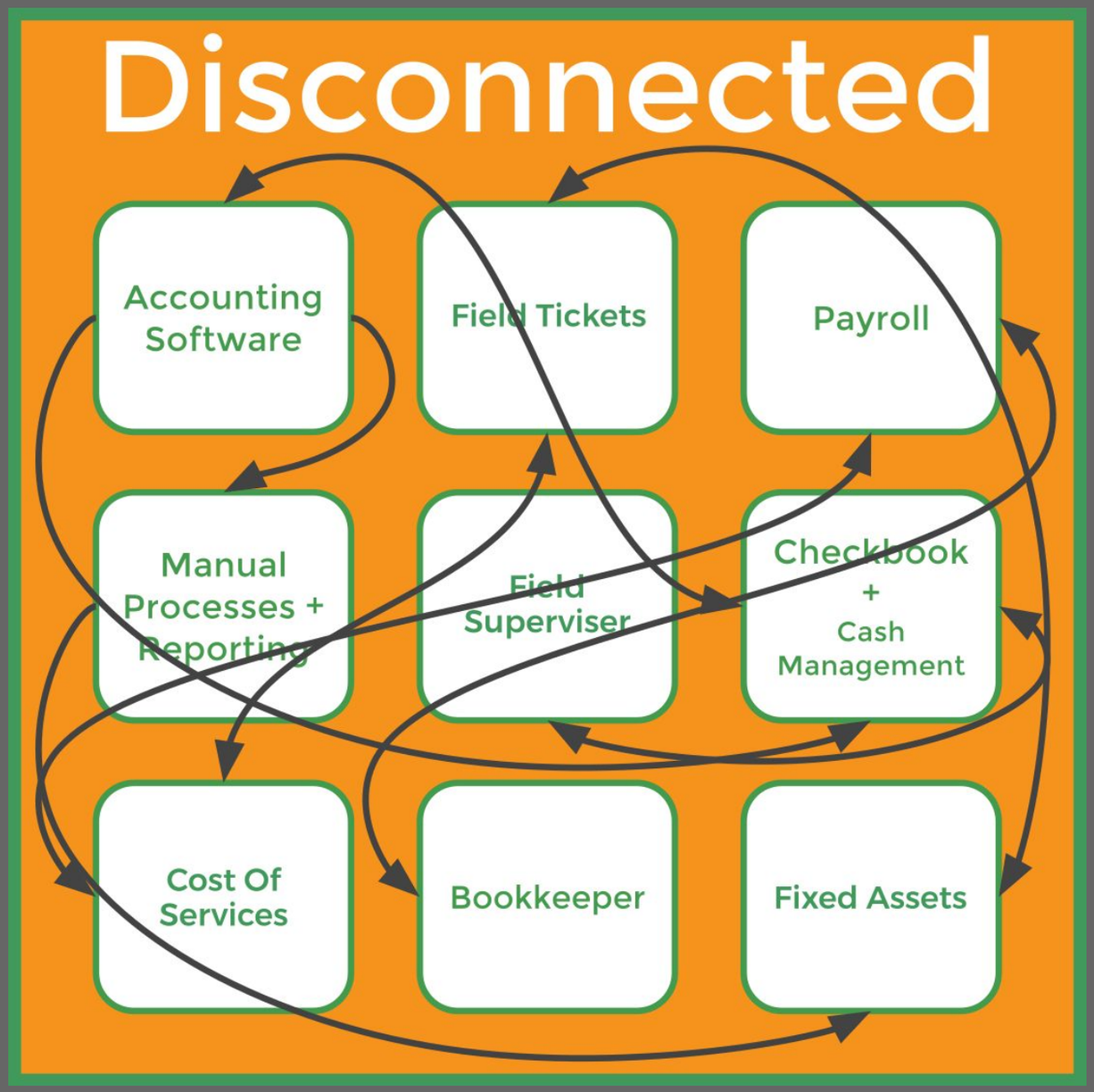
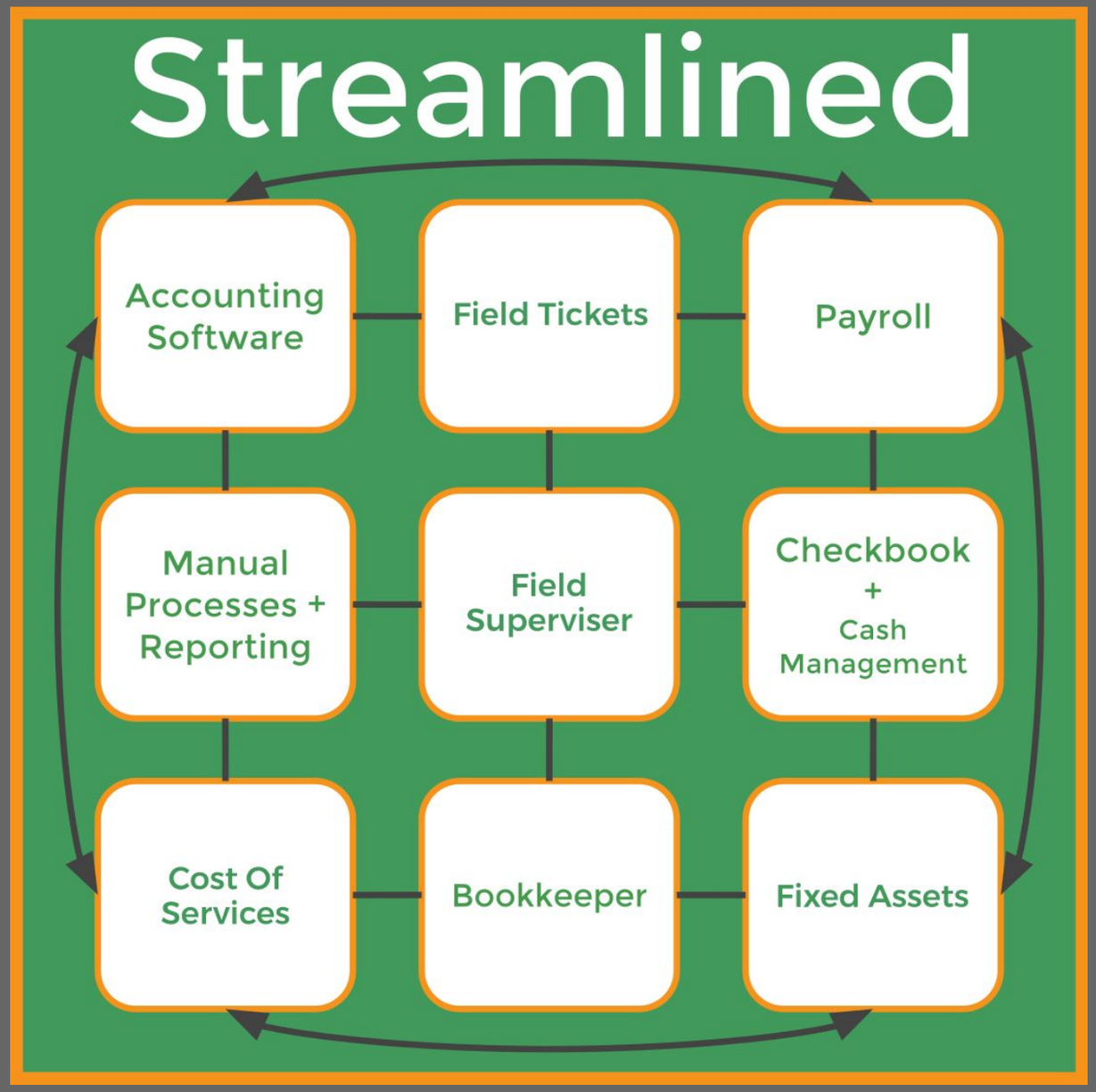



Chaotic?




Orderly?

# Transforming Chaos To Order

Using real-time, orderly data and information, we turn chaos into order and deliver actionable insights to help you effectively run your company.

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# How Are You Managing Payables & Receivables?

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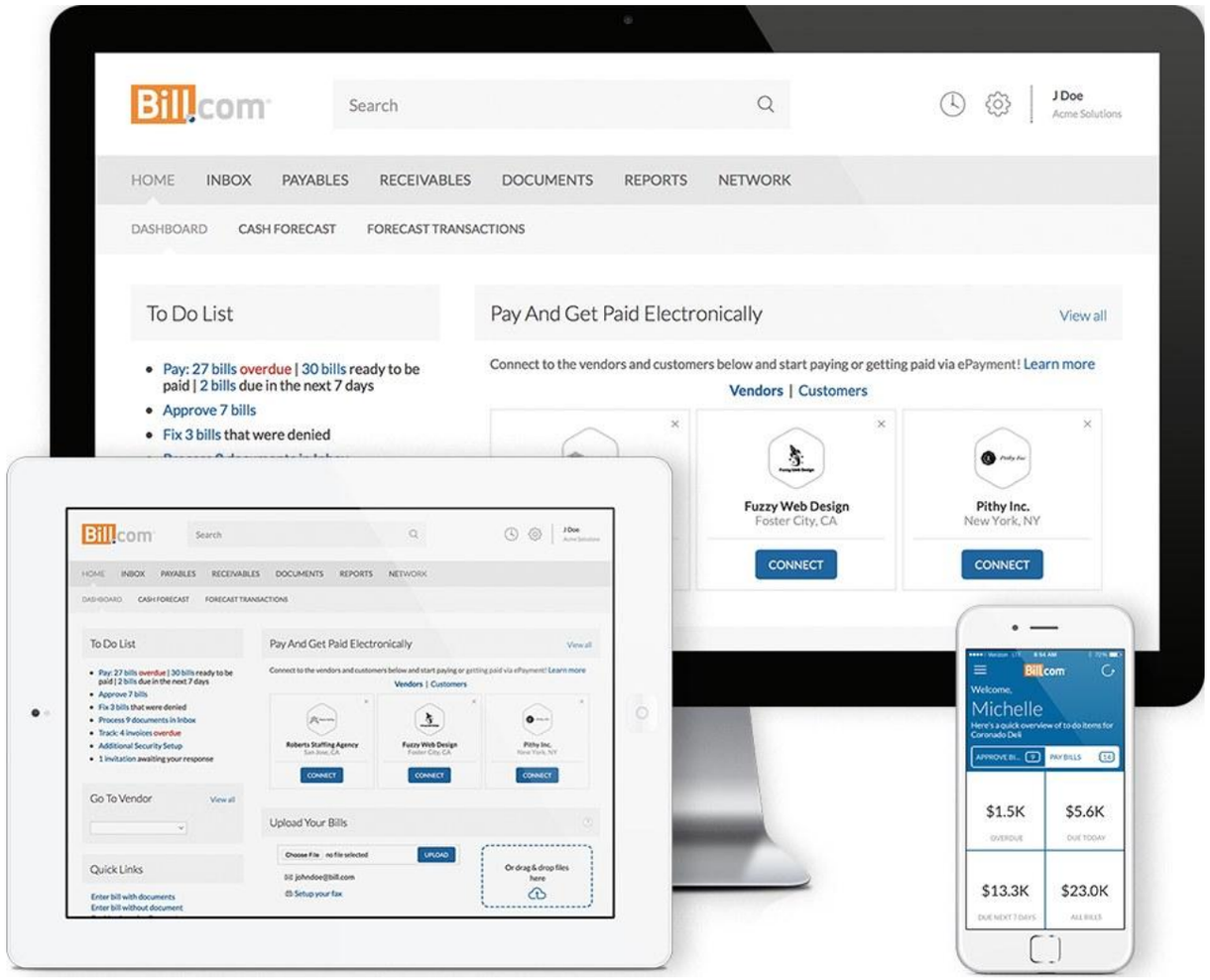


## By Hand & On Paper?

## Digitally & Cloud Based?

# Upgrade Your Process

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**Are You Dealing With** 10's & 100's of Hours of Labor To Consolidate Reports, Error Prone Activities, Multiple Dashboard Systems, & Batch Excel Imports?

**You Need** Quick Consolidated Financial & Management Reports With Easy Drill Down Reports, & Multi-Currency management.

# Financial Reporting Done Right!

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See key performance indicators automatically updated in real-time using personalized dashboards with Sage Intacct.

# Top Investment Firms Rely On Sage Intacct

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G2 CROWD
HIGHEST SATISFACTION, ACCOUNTING
2014

**11,000+**
Growth Companies

Real
**Value**

Growing with
**Intacct**

Brookfield Asset Management

APOLLO MANAGEMENT

TRILOGY GLOBAL ADVISORS®

LITMAN GREGORY ASSET MANAGEMENT

ENGINEERS GATE

RPM

WISDOMTREE®

ECP PRIVATE EQUITY

midcap FINANCIAL

ENDURANCE ASSET MANAGEMENT, LLC

FORUM PARTNERS

HALSTATT Real Estate Partners

*"Instead of looking at what has happened we use Sage Intacct as the single source of the truth to proactively analyze and drive the business looking forwards"*

Jason Gabauer, Controller
Halstatt

# We Understand The Financial Service Industry

# Benefits Of Working Together

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- Make Faster & Smarter Business Decisions
- Optimize Key Business Practices & Eliminate waste
- Empower Management

# Your Trusted Advisor

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Virtual CFO

Outsourced Controller

Back Office Accounting

# Assessment

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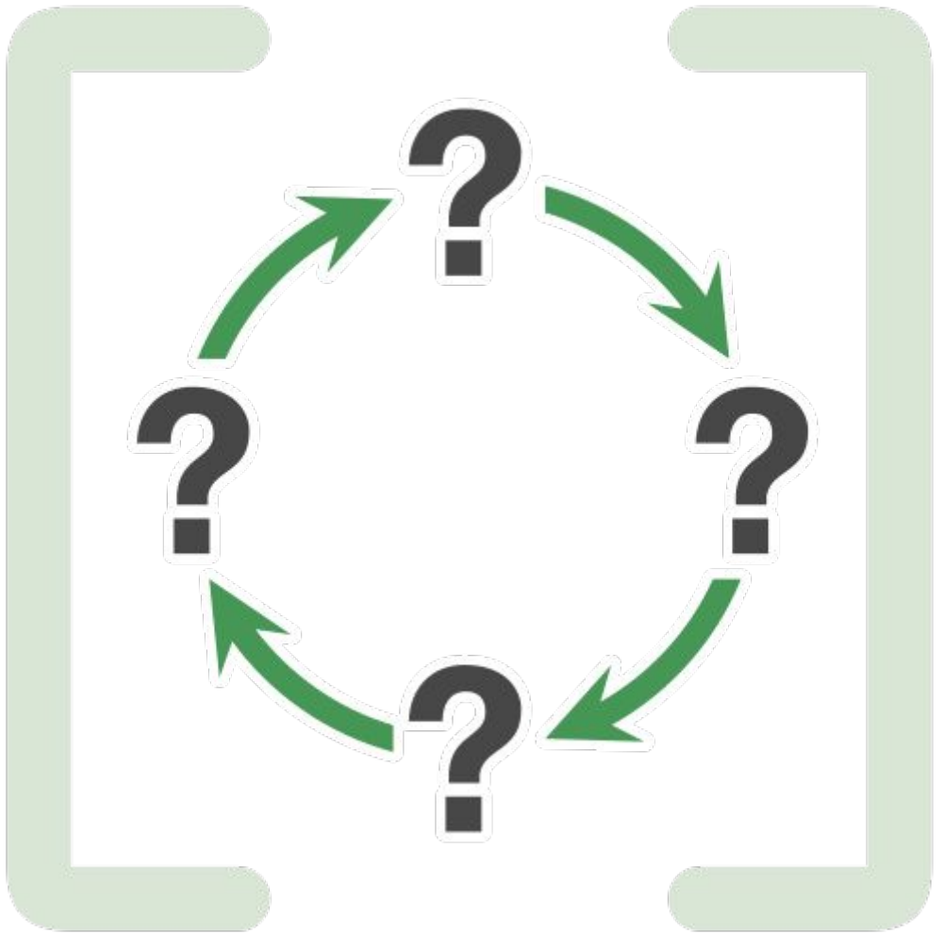

First, we'll do a full assessment of your business to discover what is and is not working in your accounting processes. Upon completion, you can expect our long lasting recommendations.

# Implementation

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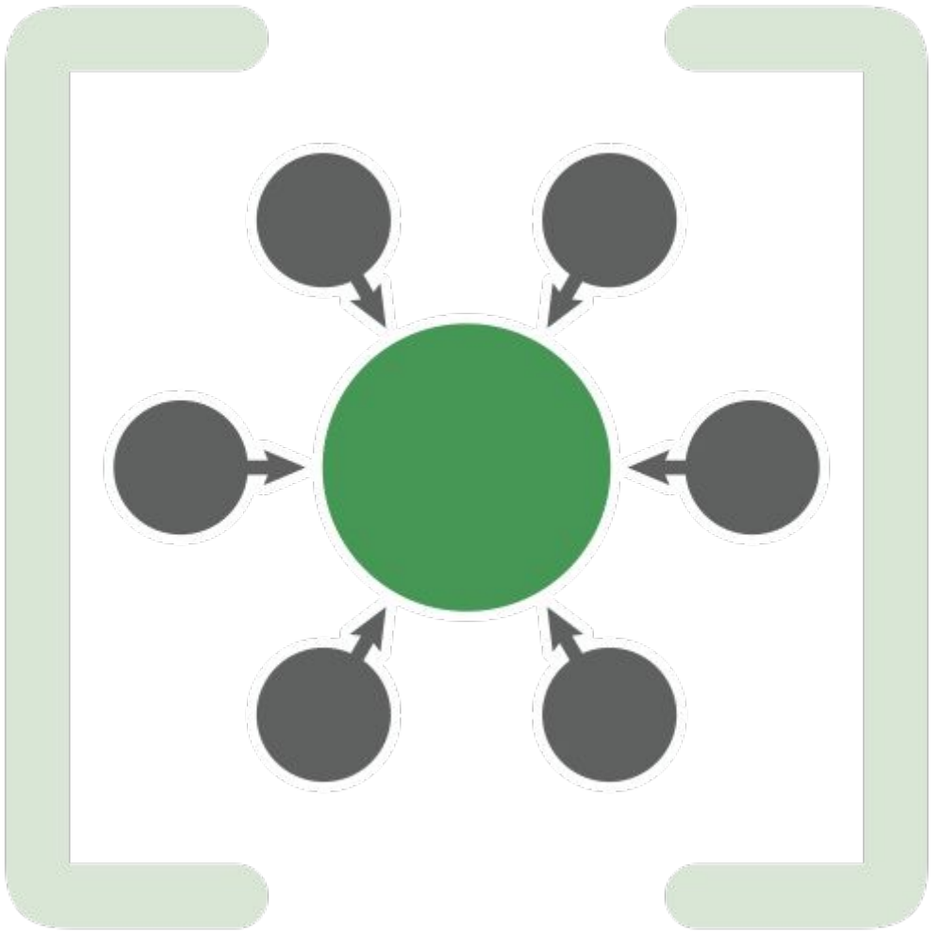

The Implementation phase is where we show you WHAT we can do for you, and HOW. With mutual agreement, we'll move forward with these initiatives.

# Client Services

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In this phase, we'll expand your current Accounting Team's capabilities with our services. This can include Back Office Accounting and Virtual CFO Services all utilizing Cloud-Based Solutions.

# Your Trusted Advisors

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Dixie McCurley

Lee Baynes

Beth Johnson

Hina Babar

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