

FinServ Consulting Firm Overview

FinServ's clients include the top leaders in the alternative asset management and banking industry:

Hedge Fund Client

AUM \$35 Billion

Strategy: Systematic Investment Manager

- Risk & Financial Reporting Documentation
- Workday HR System Implementation

Hedge Fund Client

AUM \$3 Billion

Strategy: Long/Short Equities

- Enfusion (OMS/PMS/GL) Implementation
- UCITS Compliance Rules Onboarding

Hedge Fund Client

AUM \$12 Billion

Strategy: Global Macro Fund

- Trader Compensation App
- General Ledger Implementation

Private Equity Client

AUM \$183 Billion

Strategy: Private Equity

- Operating Model Roadmap
- Wall Street Office Reporting Support

Private Equity Client

AUM \$2 Billion

Strategy: Middle Market Private Equity Fund

- Office 365 Migration
- Salesforce Implementation

Investment Bank

Top Ten Global Investment Bank

- Treasury & Liquidity Project Management
- CCAR Regulatory Reporting
- AML & Legal Entity Systems Migration

Investment Bank

Top Tier Middle Market Investment Bank

- Workday HR System Implementation
- Trading Desk Technology Management

Service Provider

Top Three Fund Administrator by AuA

- Technical Innovation Roadmap

FINSERV CONSULTING is a management consulting firm, focused on the global banking and alternative asset management industry. FinServ specializes in helping their clients align business processes with technology. Founded in 2005, FinServ has helped numerous top firms optimize their operations.

FinServ has the industry experience and technical expertise to solve business problems and identify opportunities for growth. We partner with our clients to manage complex projects, refine business strategies, and ensure their realization through the optimization of process, organization, and technology.

OUR TEAM is a diverse group of professionals with extensive financial services experience spanning the front, middle, and back office. We have the strategic expertise necessary to build optimal operating environments and ensure solutions are delivered on time and within budget. Every member of the FinServ team is trained in project management and we apply a consistent methodology to all our project work. Our team is passionate about helping our clients achieve exceptional results.



BUSINESS CONSULTING

Business process reengineering, information management, and vendor selections are just a few of the ways FinServ helps our clients create an organization that is prepared for the numerous regulatory or industry requirements either now or on the horizon.



SYSTEMS INTEGRATION

Extensive system experience across the front, middle, and back office allows FinServ to assist clients to select and integrate the best vendors and systems based upon our client's unique needs with strategic perspective.



SYSTEMS DEVELOPMENT

Proven experience in developing cost-effective systems when existing vendor applications are not available to meet the unique needs of our clients. FinServ offers onshore, offshore, and hybrid development options leveraging agile development techniques and tools.

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About FinServ Consulting

FinServ Consulting is an independent experienced provider of business consulting, systems development and integration services to alternative asset managers and their service providers. Founded in 2005, FinServ delivers customized world-class business and IT consulting services for the front, middle, and back office, providing managers with optimal and first-class operating environments to support all investment styles and future asset growth. The FinServ team brings a wealth of experience from working with the largest and most complex alternative asset management firms in the world.