

We guide organizations toward success.

Company Overview

FinServ Consulting is an independent, experienced provider of business and technology consulting services to alternative asset managers, global banks, and their service providers. Founded in 2005, our world-class consulting team offers expert, tailored guidance in the design and integration of business processes aligned with technology solutions.

FinServ offers a clear vision of where financial services firms are today, and where they should be in the future. Our mission is to help organizations build optimal operating platforms, while ensuring that they can withstand inevitable market volatility, as well as growing demands for transparency, regulation, and compliance. Our competitive advantage lies in our industry experience, business knowledge, technical expertise, use of proven methodologies, and project management techniques. With this combination, we deliver effective solutions on time and within budget.

The FinServ Promise

When you select FinServ for your project, you get an experienced team that not only expertly navigates the intricacies of your business, but also upholds the promise of on-time and on-budget delivery. At our core, we value transparency and quality. We strive for extraordinary client service on every project. It is this commitment to excellence, combined with our consistent track record of delivering projects within scope and budget, that has built a foundation of trust with our clients that led to our preeminent position in the industry.

Our Team

The FinServ team brings business consulting, project management, and integration experience from the world's top consulting and financial services firms. Our team has experienced the alternative asset industry from the inside, through not only our on-site work with investment funds, but also with alternative investment service providers including prime brokers, global custodians, and fund administrators.

We offer extensive knowledge on the best operational practices in alternative asset management, and technological infrastructure necessary to achieve an opportunistic, efficient, and compliant organization. We are passionate about our business and are committed to helping our clients succeed.

Core Services

Systems Integration



FinServ utilizes a best-of-breed approach by identifying the optimal vendor solution to meet each client's specific needs. Our extensive experience with systems such as Workday, Office365, Salesforce, Black Mountain Systems, Enfusion, etc., which spans the front, middle, and back office, ensures clients select and implement the best solutions based on their unique requirements. Through a focus on detailed requirements gathering, technical design documentation, and reengineering client business processes, we guarantee each client project is successful and maximizes their usage of the selected systems.

Systems Development



For business needs that require bespoke solutions, FinServ offers onshore, offshore, as well as hybrid development models. We have a proven track record and deep experience in developing cost-effective systems for financial services firms. We have created various systems for our clients including trading, regulatory compliance & reporting, compensation, and risk management applications.



Business Consulting

FinServ provides services to help firms strengthen internal processes and streamline operations. Our offerings include operational assessments, vendor selections, data management, and more. Whether it's developing policies and procedures documentation for an upcoming audit, or documentation of the overall operational model, FinServ prepares organizations for regulatory, investor, and managerial requirements now and for the future.



insight | vision | experience

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