

## **Company Background**

Finnovative, Inc. founded in 1995 is a full service solution provider addressing the specific needs of the entire spectrum of participants in the investment management industry.

Our team of industry professionals combines expertise in global markets, research and analytics, trading and operations, technology, client service, and support.

Over the last 15 years, Finnovative has helped over 80 firms optimize their resources that have improved efficiency, reduced costs, and assured compliance, so that clients can focus on their asset gathering, client servicing, and asset management expertise that are critical to AUM growth.

## **Consulting and Advisory Services**

This suite leverages our experience across a broad spectrum of the investment management market to assess and recommend solutions guidance to you.

### **Strategic Technology Assessment and Roadmap**

- Architectural Review, Assessment and Roadmap for front, middle and back office including external partners
- Evaluate operational workflow
- Analyze data and information flow
- Identify redundancy, gaps, and inefficiency sources making recommendations to align with Industry Best Practices

### **GIPS Advisory, Implementation, Verification and Maintenance**

### **Systems Analysis, Search, Evaluation and Selection**

### **Infrastructure Planning**

- Conduct Design, Modify, & Testing of Business Continuity Plan
- Compliance Analysis and Mock Audits

## **Products**

**MarketBridge<sup>sm</sup>**: Data Integration Software for integrating *Bloomberg* Data License into Portfolio Accounting, Trading, Research and Compliance Systems. Integrations include Advent Axys, APX, Charles River, PAM and other platforms.

**Portview<sup>sm</sup>**: Composite Construction, Composite Management, and Reporting Software for GIPS Compliance.

## **Project Management, Data Integration and Implementations**

### **Implementations**

Finnovative works with business users, IT, and vendors to ensure that solutions are implemented to accommodate the specific requirements and flexibility needed by clients.

### **Data Integration and Warehousing**

Integrate, Customize, and Support Third Party and Proprietary systems for Portfolio Accounting, Trading, Analytics and Data Warehousing needs.

## **Partial Client List:**

Atlas Capital Advisors LLC  
AMB Property Corporation  
Bivium Capital  
Blue Oak Capital Management  
Conifer Securities  
GlobeFlex Capital L.P.  
Hutchinson Capital Management  
Menlo Advisors LLC  
Mercury Insurance Corporation  
Perigon Wealth Management, LLC  
Osterweis Capital Management  
PlanMember Financial Corporation  
Progress Investment Management Company  
Research Affiliates LLC  
SNW – Seattle Northwest Securities  
Stanford Investment Group  
Woodside Asset Management

## **Contact:**

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