
PROFESSIONAL SERVICES

Take advantage of our custom services





Designed for the reality of financial services.

Croesus is committed to providing services that are adapted to the needs of companies to help them maximize their investments in wealth management technologies.

Through its professional services offering, Croesus shares its expertise in business architecture, data management, quality assurance, and business and training processes.

Benefits

- ✓ Expertise of our seasoned specialists
- ✓ Increased competitive advantage
- ✓ Optimized operational efficiency
- ✓ Attainment of compliance objectives
- ✓ Achieving a better return on investment
- ✓ Facilitated implementation of important initiatives and transitions

Key features

Planning of
business strategies

Initial needs analysis for
client integration

Analysis of processes asso-
ciated with the system change

Data management
and planning

Data analysis

Quality assurance planning
and management

Training and documentation

A solid business architecture

From your corporate vision to your business solutions and strategies, Croesus supports you at every stage to build a solid business architecture. The different stages include performing a gap analysis, determining best practices, and managing forthcoming changes.



Success guaranteed by relevant data

To take advantage of the data in line with your objectives, you can customize Croesus Data Analytics or integrate other sources of data: data analysis, cartography, integration, conversion, and processing.

We can help you extract and process data coming from the back office, the market, or additional software. You can use a variety of sources, such as IBM, Dataphile, ADP, Broadbridge, and Morningstar, and integrate the downstream raw data to send to a database.

Adapted training

Our current, potential, and future clients all receive the same unparalleled level of service. Croesus offers an array of training choices adapted to your needs. The training sessions are offered by Croesus specialists on site or by webinar. To better serve you, an analysis of your company and your needs will be performed.

About Croesus

Since 1987, Croesus has been providing sophisticated wealth management solutions to financial institutions throughout North America. Currently, 14,000 investment professionals use Croesus solutions to manage over \$1 trillion in assets. With its 180 dedicated employees, Croesus has built a reputation on the ability to efficiently transform data into information, develop portfolio management solutions to drive efficiency and deliver business intelligence for fact-based decision-making.



www.croesus.com