

Linedata Advisory Services

Senior consultancy, global expertise and robust project management to transform your investment management business

Driving transformation is difficult, especially when it's "all hands on deck" to run your business. As a business leader, you need to focus and extend your in-house resources and expertise without breaking the bank or letting daily operations falter. Finding trusted partners is hard; many consultancies are either too big to provide the focus you deserve, or too limited to deliver truly end-to-end solutions.

At Linedata, we're the right size to meet your needs. Our senior consultants will help you define and deliver the right technology strategy for your business. From application selection to project management and implementation, we bridge the knowledge gap between your business and technology teams.

We'll help you achieve speed and scale, build trust, mitigate fear of change and maximize project success and ROI.

Linedata Advisory Services helps investment firms transform their operations to achieve business success.

We provide robust consulting and staff augmentation covering executive IT, project management, business analysis and program implementation.

Our team of experts will address your knowledge and leadership gaps while providing the scale and leverage needed to achieve your "change-the-business" objectives.

Make us your "go to" team to achieve success!



CTOs / CIOs / PMO

Complete projects faster with lower risk. Our consultants provide executive IT, project management, business analysis and implementation leadership and delivery so your organization can focus on core activities and maximize overall project value and ROI.



Portfolio Managers, CROs and Analysts

Achieve better outcomes with scalable and organized decision support technology. We provide the best of both worlds: free-thinking analyst toolkits supported by the structure and security of best-practice IT management.



COOs and other C-level executives

Grow assets without the risk of operational disruptions or out-of-control costs. We provide independent assessments and deliver technology and business transformation roadmaps that unleash your firm's growth potential.

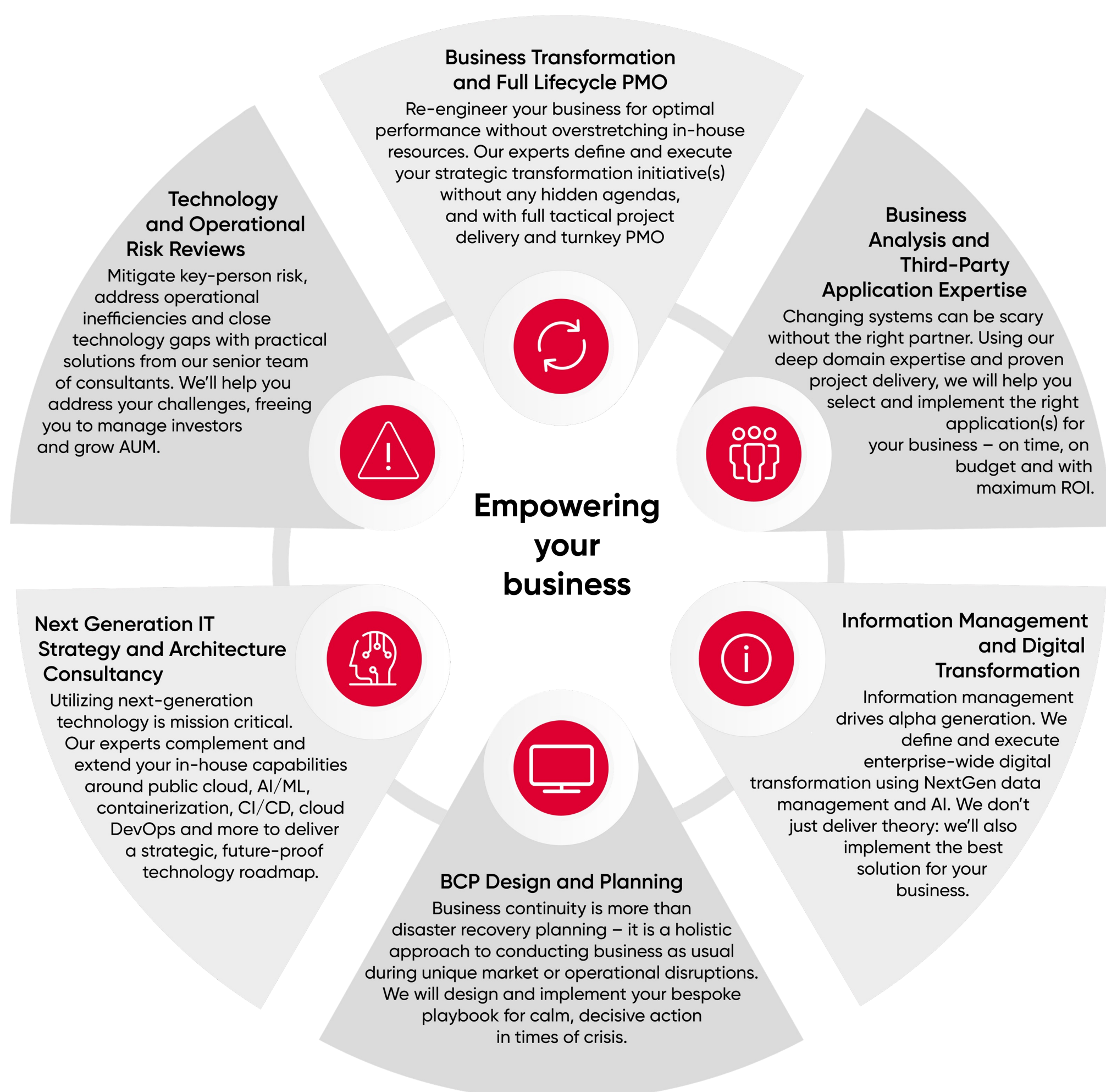
Benefits

- **Confident decision-making with expert advice** from senior consultants and subject matter experts in business, operations and technology
- **Ability to change your firm's technology curve** by freeing key in-house resources to focus on higher-value activities
- **Organization-wide risk mitigation:** operational, technological, project completion, key person and more
- **Flexible, scalable team structures** (project / dedicated, onshore / offshore) and follow-the-sun model
- **Faster ramp-up and less overhead** than traditional tech consultants because we're investment management experts

Expertise and Capabilities

- **Proven track record of improving daily operations** and reducing operational risk by leveraging the right technology
- **Independent consultative expertise** on operational and technology best practices
- **Broad portfolio of work product and decades of hands-on experience** covering all facets of buy-side operations, from idea generation to accounting and income allocation
- **In-depth platform knowledge:** Linedata, Advent Geneva, Aladdin, APX, Broadridge, Charles River, Cogency, EzeCastle, RiskMetrics, VPM etc.
- **Tried and tested services and support,** grounded in business continuity and continuous local or remote service delivery

Senior consultancy from technology and investment industry experts




About Linedata Global Services

At Linedata Global Services, we provide the financial services industry with the tools, processes and resources to scale their business while enhancing quality and competitive edge. Our finance and technology professionals complement or augment your resources, providing expert advice, business process co-sourcing, IT managed services, cybersecurity, analytics, and next-generation technology solutions that help you drive change, control costs, and manage risk. Choose the tailored solution that fits your needs.

About Linedata

Linedata offers a robust, configurable platform of software, data and services that enable our wealth, institutional and alternative clients to grow, operate efficiently, manage change and provide excellent service to their own clients and stakeholders. With over 20 years' experience, Linedata delivers humanized technology that empowers leading asset management and credit industry firms worldwide to evolve and operate at the highest levels.

 **700+** clients

 **50+** countries

 **1300** employees

 **20** offices

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