

**opsdog**

**OPM 2.0 FORMAT**

**INVESTMENT/ASSET MANAGEMENT**

**Trust Account (Product Life Cycle)**

**The OpsDog Financial Services Hierarchy**

- Investment/Asset Management
  - Equities Research
  - Portfolio Installation
  - Trader/Transaction Support
  - Retirement Services
  - Mutual Funds
  - Real Estate Investment Trust (REIT)
  - Accounting & Reporting
- Client Services
  - Trust Account (Product Life Cycle)
- Distribution

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**Trust Account (Product Life Cycle): Workflow**

- A Account Opening
- B Account Maintenance
- C Account Closing

**Workflow Description**

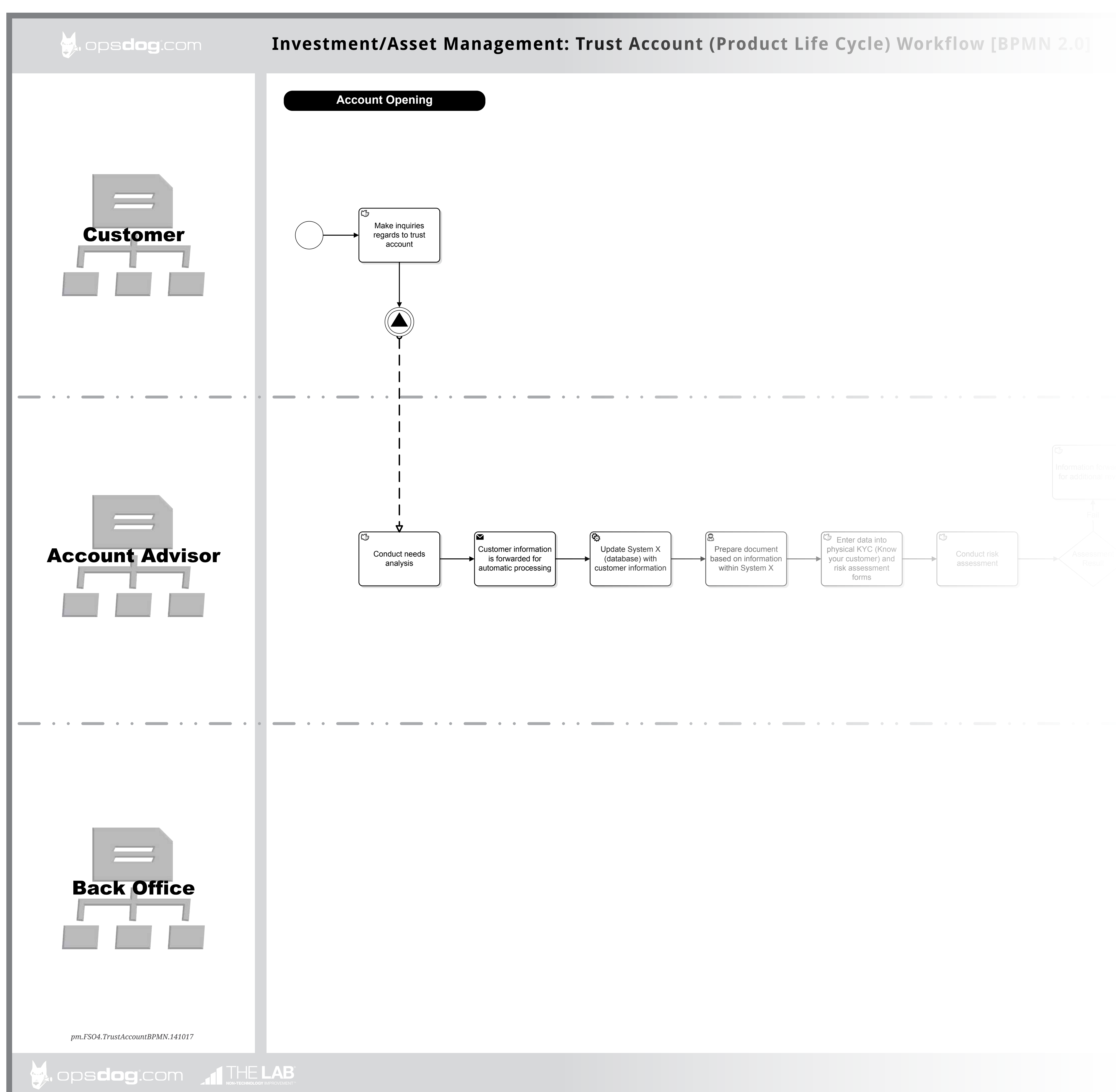
The initiation, maintenance and closing of investment trust accounts. Includes product needs analysis, risk assessment, account opening, asset allocation, and account closing.

**Legend**

- Start Event
- Intermediate Event
- End Event
- Gateway
- Group
- Task
- Expanded Sub-Process
- Pool
- Sequence Flow
- Message Flow

**WORKFLOW**

**DO-IT-YOURSELF BUSINESS PROCESS IMPROVEMENT**



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