

opsdog

WORKFLOW

INVESTMENT/ASSET MANAGEMENT

Institutional 401K - Life Cycle

The OpsDog Financial Services Hierarchy

- Investment/Asset Management
 - Equities Research
 - Portfolio Installation
 - Trade/Transaction Support
- Retirement Services
 - Institutional 401K - Life Cycle**
 - Mutual Funds
 - Real Estate Investment Trust (REIT)
 - Accounting & Reporting
 - Client Services
 - Distribution

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Institutional 401K - Life Cycle: Workflow

- Account Opening
- Account Maintenance
- Account Closing

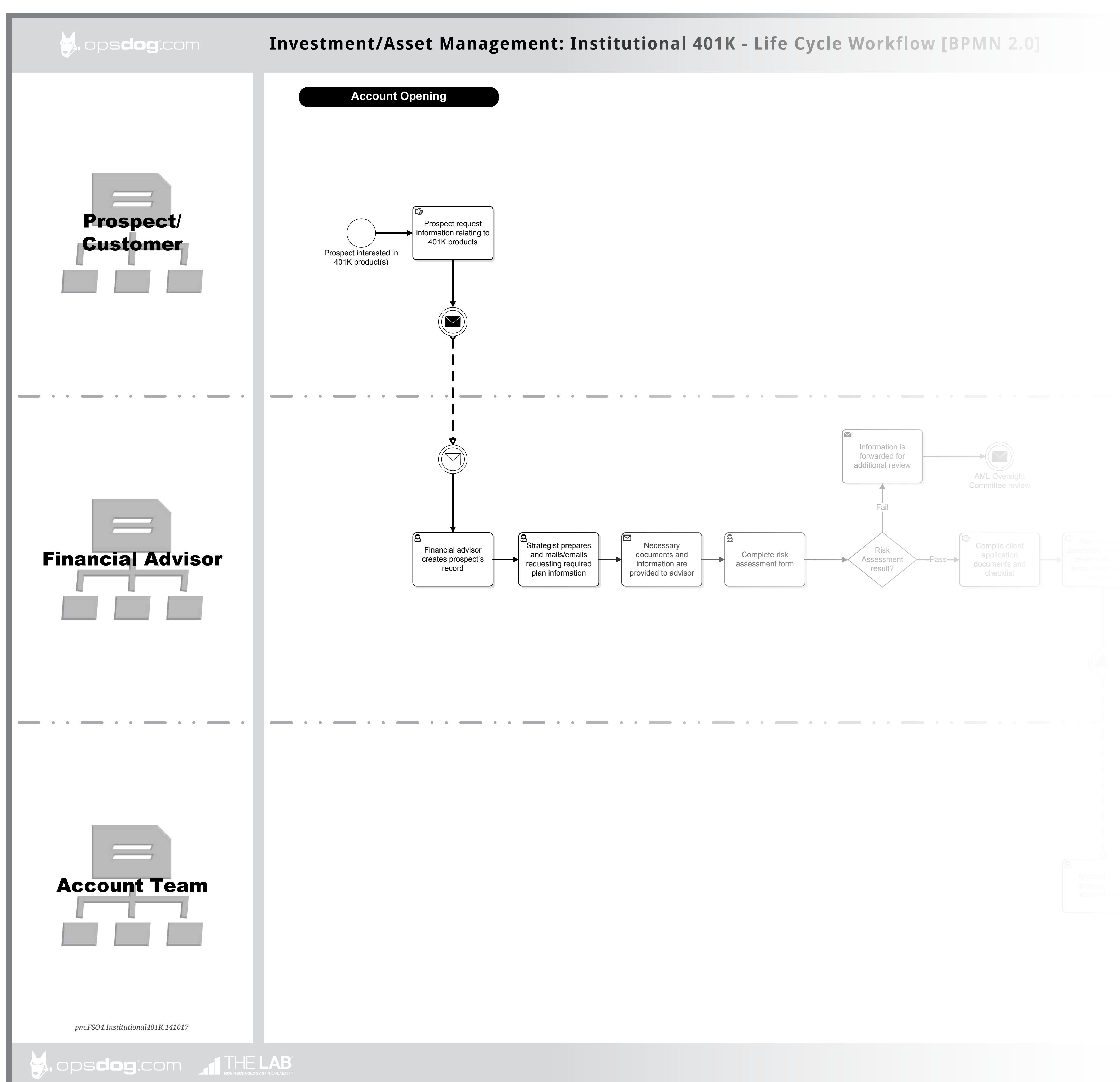
Workflow Description

The Initiation, maintenance and closing of institutional 401K investment account. Includes record keeping, risk assessment, account opening, status maintenance, and account closing.

Legend

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

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