

opsdog

OPM 2.0 FORMAT

INVESTMENT/ASSET MANAGEMENT

Institutional 401K - Life Cycle

The OpsDog Financial Services Hierarchy

- Investment/Asset Management
 - Insurance
 - Banking
 - Broker Dealer
 - Consumer Finance
- 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

www.OpsDog.com | info@OpsDog.com | Phone: 201.526.1200 | www.TheLabConsulting.com

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.

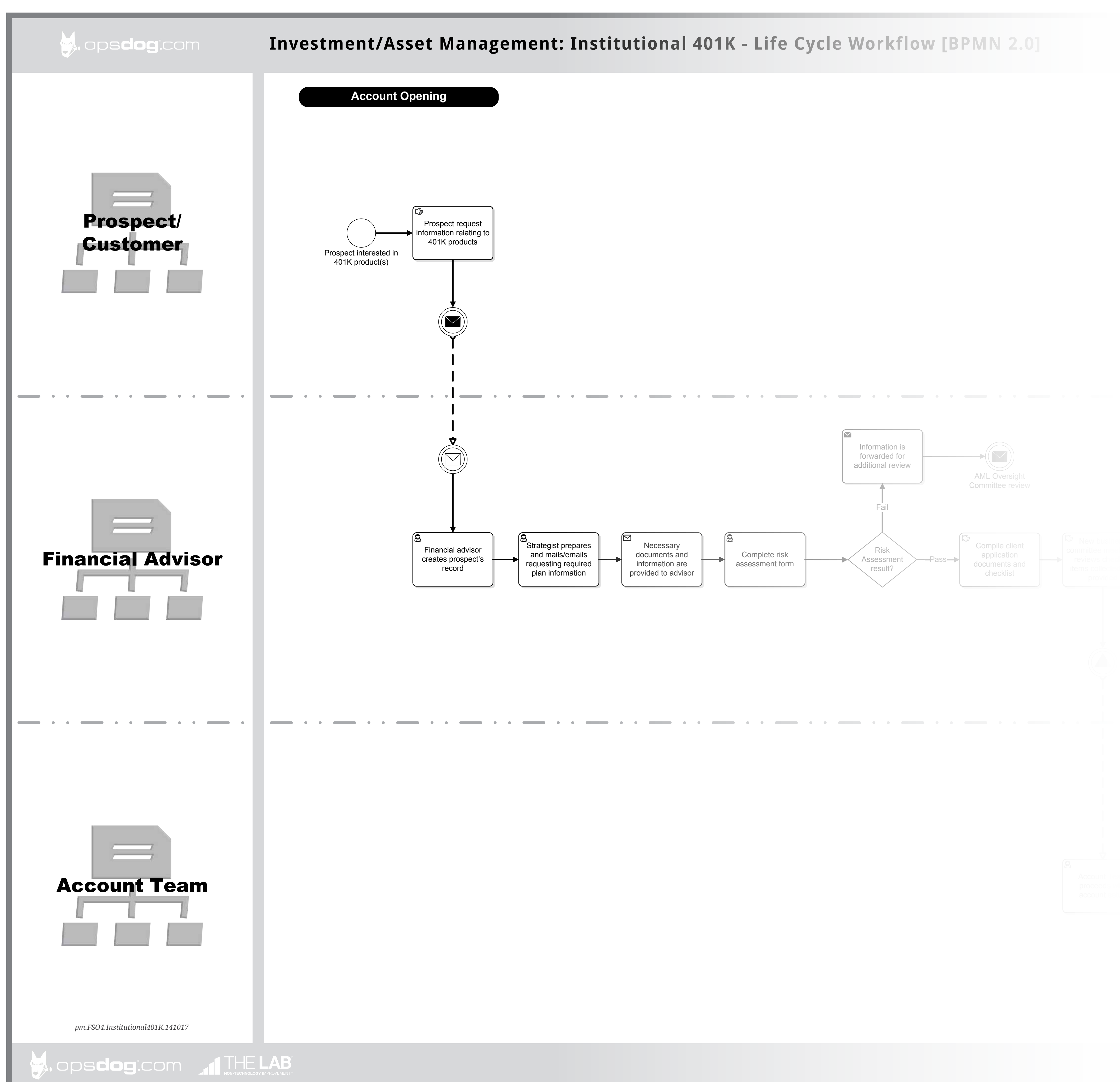
Legend

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

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