

opsdog

BPMN 2.0 FORMAT

INVESTMENT/ASSET MANAGEMENT

Institutional Plan Implementation

The OpsDog Financial Services Hierarchy

- Investment/Asset Management
 - Insurance
 - Banking
 - Broker Dealer
 - Consumer Finance
- Equities Research
- Portfolio Installation
 - Institutional Plan Implementation
- Trade/Transaction Support
- Retirement Services
- 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 Plan Implementation: Workflow

- A Planning, Kick-Off & Discovery
- B Design & Test
- C Conversion & Go-Live

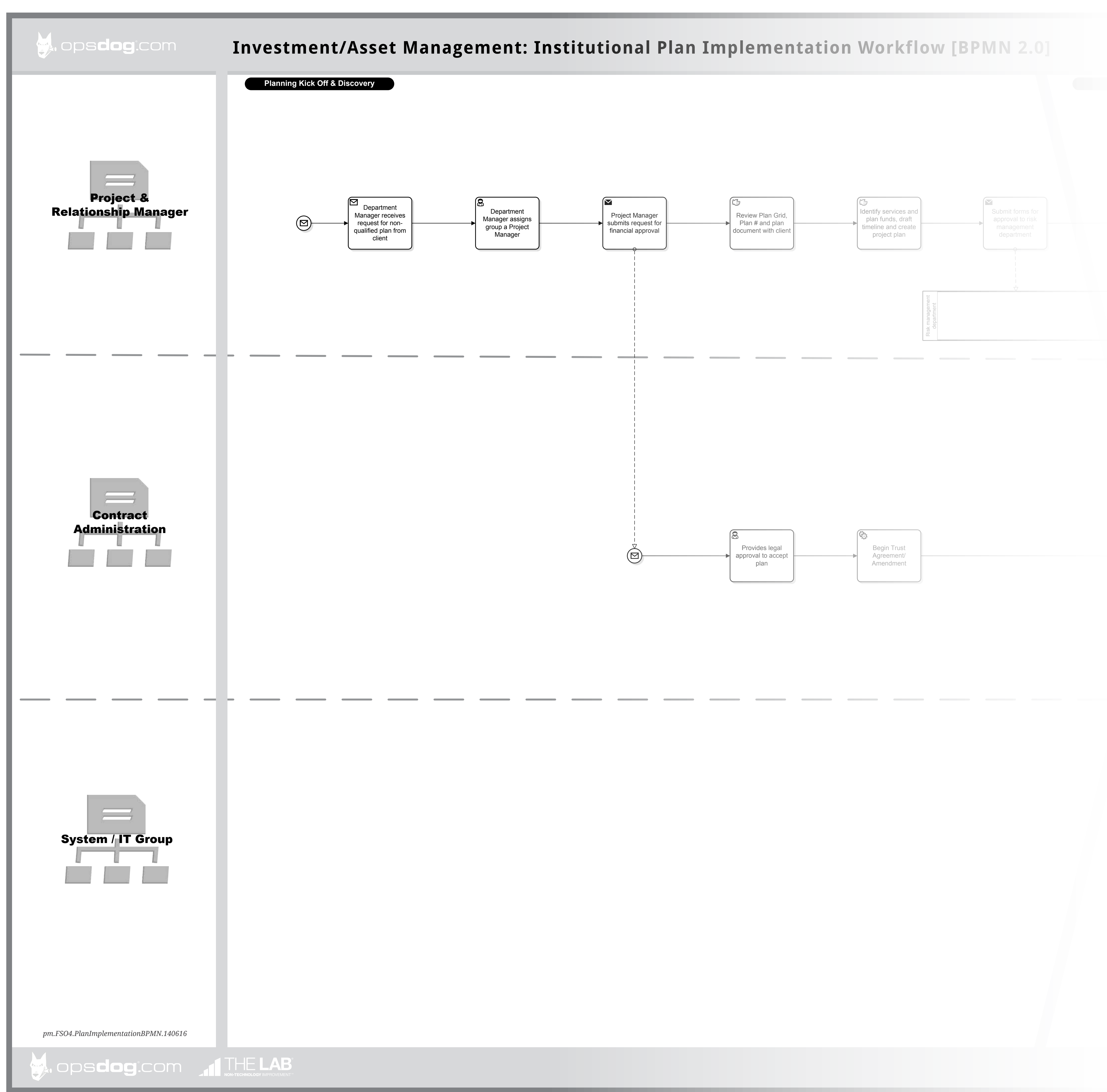
Workflow Description

The design, development and setup of investment portfolios and overall investment strategies for institutional investment management clients.

Legend

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

Copyright © OPSDOG, INC., 2014 | ALL RIGHTS RESERVED
This content may not be copied, distributed, republished, uploaded, posted or transmitted in any way without the prior written consent of Opsdog, Inc.



Login to **OpsDog** to purchase the full workflow template (available in PDF, Visio, PPT)

New users get \$20 off their first purchase (registration is FREE!)