

opsdog

WORKFLOW

INVESTMENT/ASSET MANAGEMENT

Data Collection

The OpsDog Financial Services Hierarchy

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

Equities Research

Data Collection

- Portfolio Installation
- Trade/Transaction Support
- Retirement Services
- Mutual Funds
- Real Estate Investment Trust (REIT)
- Accounting & Reporting
- Client Services
- Distribution

Data Collection: Workflow

- A Setup
- B Processing
- C Customer Requests & Maintenance

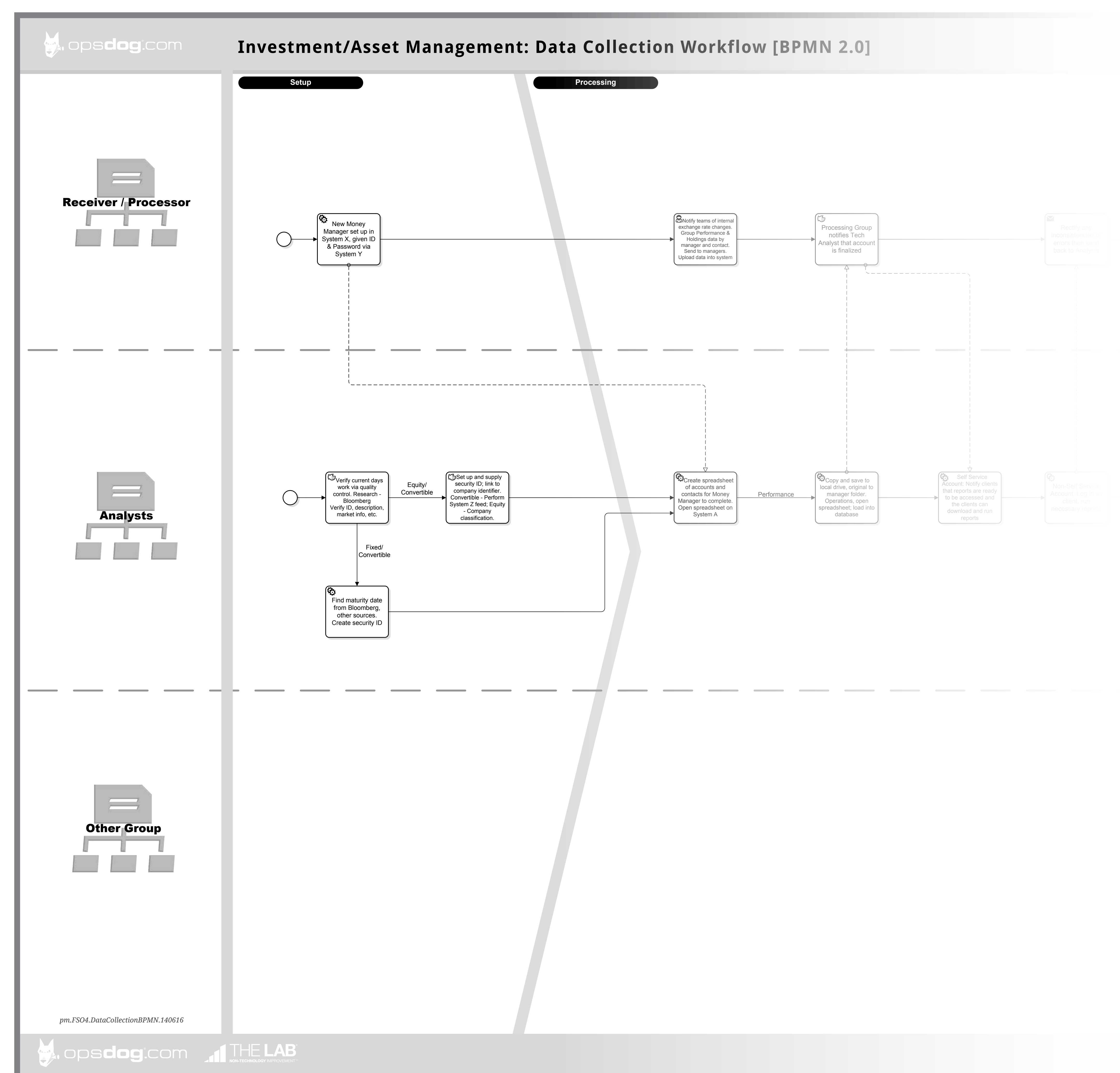
Workflow Description

Setup, processing, maintenance, and information reconciliation for internal data systems related to investment management research and analysis.

Legend

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

DO-IT-YOURSELF BUSINESS PROCESS IMPROVEMENT



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