

opsdog

BPMN 2.0 FORMAT

INVESTMENT/ASSET MANAGEMENT

Client Services & Retention

The OpsDog Financial Services Hierarchy

- Investment/Asset Management
 - Insurance
 - Banking
 - Broker Dealer
 - Consumer Finance
- Equities Research
- Portfolio Installation
- Trade/Transaction Support
- Retirement Services
- Mutual Funds
- Real Estate Investment Trust (REIT)
- Accounting & Reporting
- Client Services**
 - Client Services & Retention**
- Distribution

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General Client Services: Workflow

- A Client Services
- B Moving Funds & Trade Desk Operations

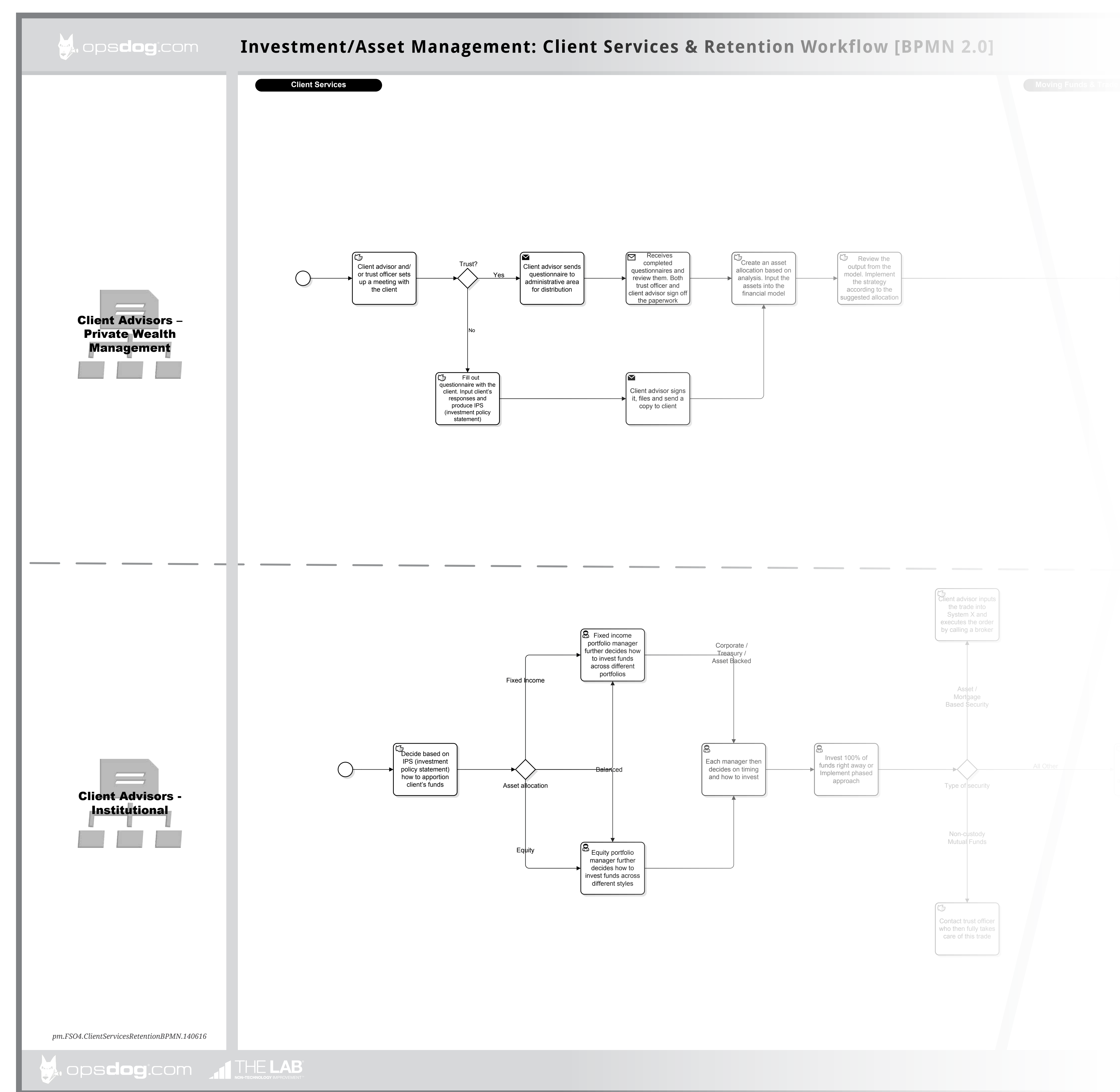
Workflow Description

Includes customer service functions related to private wealth management (PWM) such as meeting requests, client advising, asset allocation and portfolio adjustments.

Legend

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

DO-IT-YOURSELF BUSINESS PROCESS IMPROVEMENT WORKFLOW



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

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