

opsdog

WORKFLOW

INVESTMENT/ASSET MANAGEMENT

Performance Management (Bundled)

BPMN 2.0 FORMAT

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
- Performance Management (Bundled)
- Client Services
- Distribution

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Performance Management (Bundled): Workflow

- A New Account Setup
- B Composite Index Setup
- C Monthly Processing

Workflow Description

The initial setup and ongoing maintenance of new bundled investment management customer accounts.

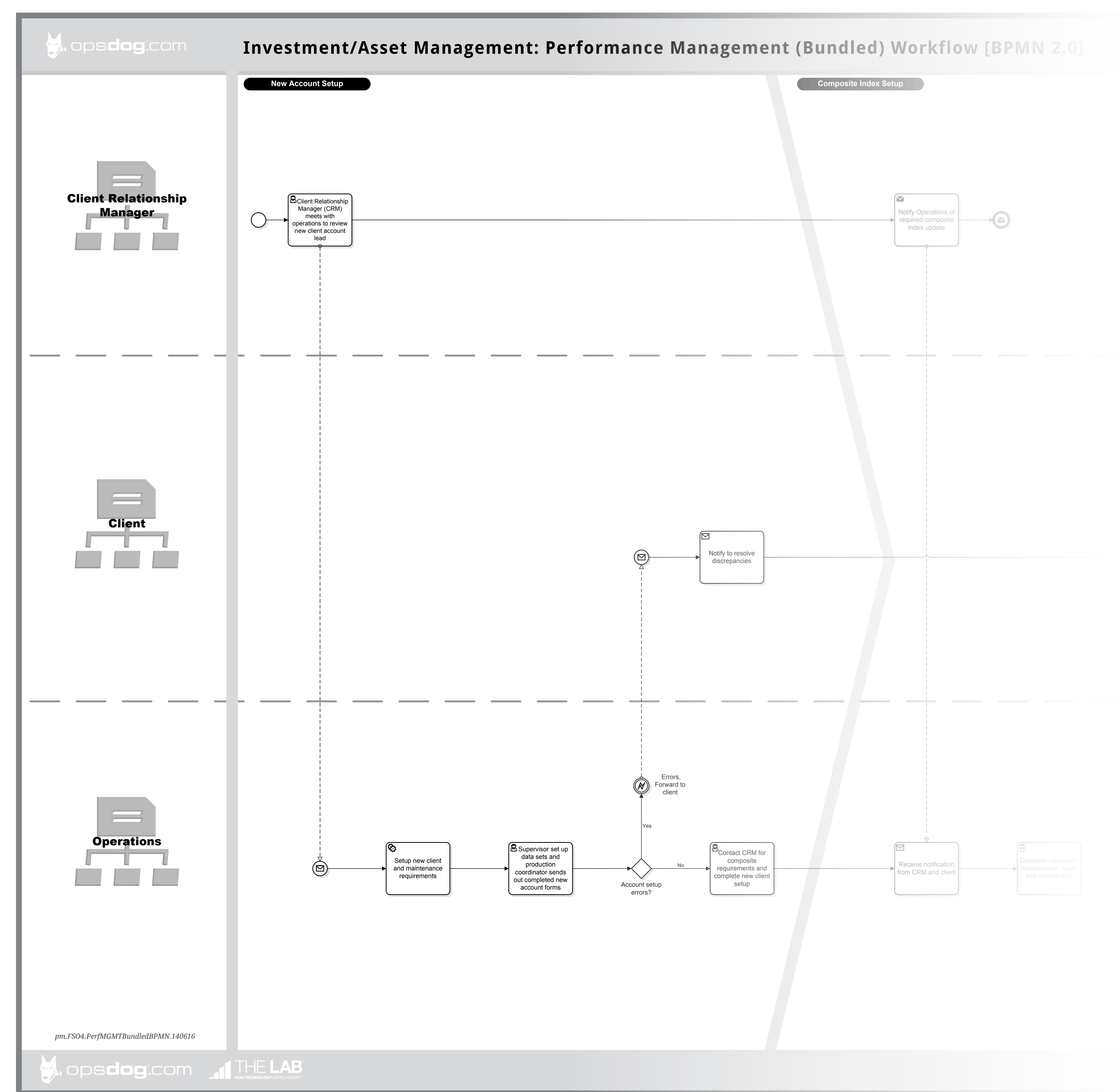
Legend

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

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