

opsdog

BPMN 2.0 FORMAT

INVESTMENT/ASSET MANAGEMENT

Trade Research

The OpsDog Financial Services Hierarchy

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

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Trade Research: Workflow

- Reconciliation
- Research
- Resolution

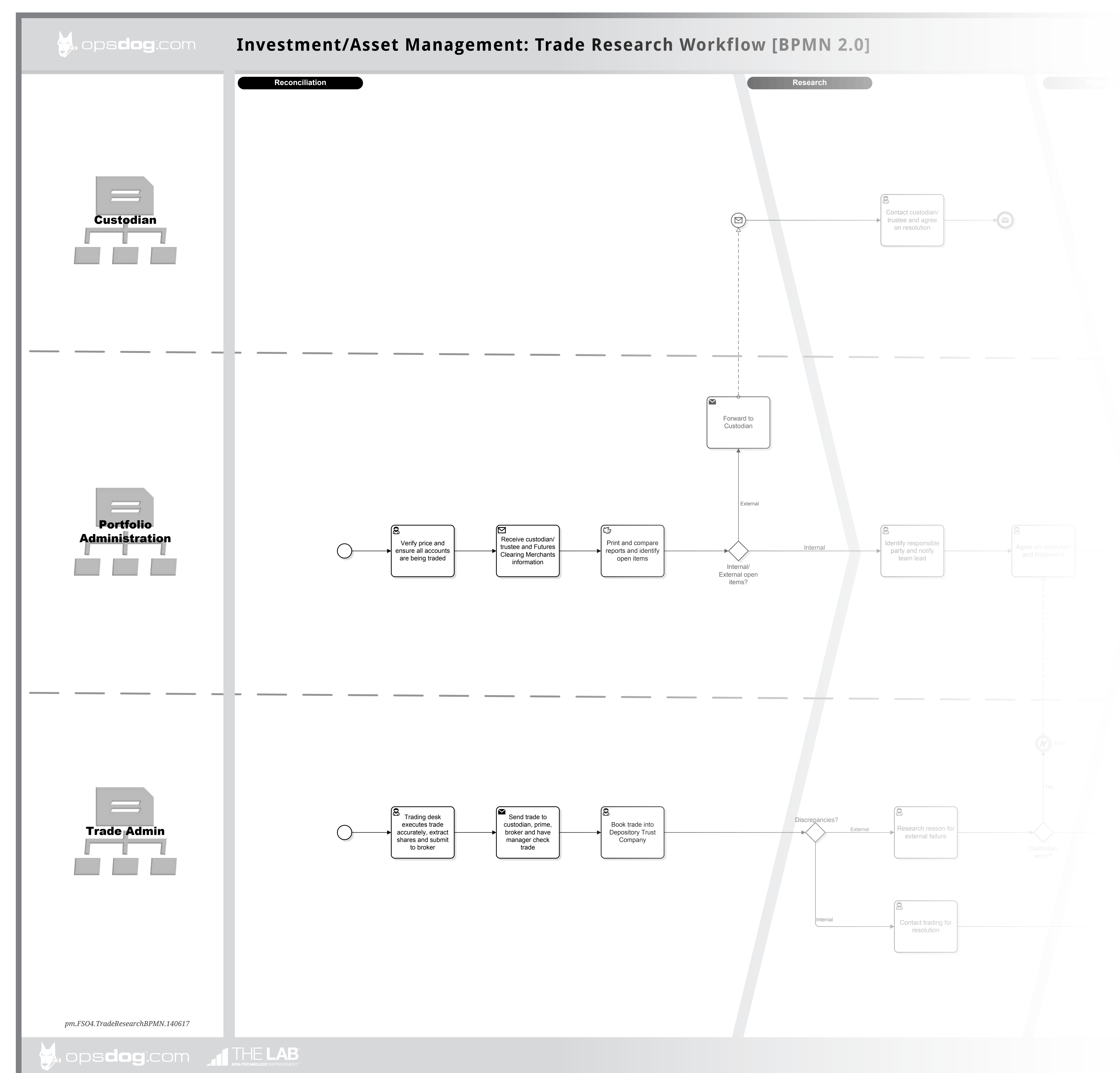
Workflow Description

The review of trades made by the investment management group for discrepancies and/or open items.

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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