

**M1 FINANCE**

M1 is the intelligent, seamlessly integrated money management platform that puts your financial future in your hands. Our mission is to empower you to improve your financial well-being. M1 combines investing, borrowing, and cash management in one easy-to-use platform.

Invest: Build a portfolio of stocks and ETFs for free with an M1 Finance account. *Borrow:* Unlock a low-cost flexible portfolio line of credit with just \$10,000 invested. *Spend:* Get the best of digital banking that integrates with your investments

DEMOGRAPHICS

- **INDUSTRY** | FINANCIAL SERVICES
- **HEADQUARTERS** | CHICAGO, IL
- **FOUNDED** | 2015
- **EMPLOYEES** | 135+
- **EXISTING ERP** | QUICKBOOKS
- **OTHER SYSTEMS** | AIRBASE, GUSTO, AMAZON REDSHIFT, BANKING

SALES TEAM

- **NETSUITE** | SAL DESAI
- **CARAVEL** | SCOTT CURRY
CAILA COHEN

NETSUITE SOLUTION

- **NETSUITE** | SUITESUCCESS FINANCIALS FIRST STD
- **MODULES** | FINANCIALS, AP INVOICE TO PAY, AR INVOICE TO CASH, EXPENSE REPORTING, FIXED ASSETS
- **INTERFACES** | BANKING, AMAZON REDSHIFT, AIRBASE, GUSTO

IMPLEMENTATION

- **TIMELINE** | 4 MONTHS
- **METHODOLOGY** | SUITE SUCCESS + OPTIMIZATION
- **APPROACH** | M1 FINANCE WILL DEPLOY NETSUITE IN A SINGLE PHASE INTEGRATING TO VARIOUS 3RD PARTY SYSTEMS.