

**PENSIONMARK**

Pensionmark Financial Group was founded in 1988 as a consulting firm dedicated to the retirement plan industry. Pensionmark now has over 3,000 corporate retirement plans and \$80 billion\* in assets supported.

With 300 advisors and staff throughout the United States, we have assembled committed and experienced professionals with one guiding purpose in mind: to help Plan Sponsors and Individual Investors meet and exceed their retirement plan needs and obligations.

**DEMOGRAPHICS**

- **INDUSTRY** | FINANCIAL SERVICES
- **HEADQUARTERS** | SANTA BARBARA, CA
- **FOUNDED** | 1988
- **EMPLOYEES** | 140+
- **EXISTING ERP** | QUICKBOOKS
- **OTHER SYSTEMS** | SALESFORCE, BILL.COM, CONCUR, PAYLOCITY

**SALES TEAM**

- **NETSUITE** | JORDAN EDELSON
- **CARAVEL** | SCOTT CURRY, CAILA COHEN

**NETSUITE SOLUTION**

- **NETSUITE** | SUITESUCCESS FINANCIALS 1<sup>ST</sup> STD
- **MODULES** | FINANCIALS, RECORD TO REPORT, AP INVOICE TO PAY, ORDER TO CASH
- **INTERFACES** | BANKING, LOCKBOX, SALESFORCE, CONCUR, BILL.COM, PAYLOCITY

**IMPLEMENTATION**

- **TIMELINE** | 4 MONTHS
- **METHODOLOGY** | SUITE SUCCESS + OPTIMIZATION
- **APPROACH** | PENSIONMARK WILL DEPLOY NETSUITE IN A SINGLE PHASE WITH CORE FUNCTIONALITY GOING LIVE IN MONTH 4 AND INTEGRATING TO VARIOUS 3RD PARTY SYSTEMS IN PHASE 1.