



## RP Investment Advisors

RPIA is a specialized fixed income manager with expertise in corporate bonds and active interest rate management. The firm was founded in 2009 by a highly experienced team that has now grown to over 100 people including investment and risk professionals with complementary skills to those of our founders. They take an active, innovative approach to fixed income to offer our investors what we believe is a better way to meet their objectives.

## DEMOGRAPHICS

- **INDUSTRY** | FINANCIAL SERVICES
- **HEADQUARTERS** | TORONTO, ON
- **FOUNDED** | 2009
- **EMPLOYEES** | 500
- **EXISTING ERP** | QUICKBOOKS
- **OTHER SYSTEMS** | CONCUR, ADAPTIVE, CERIDIAN

## SALES TEAM

- **NETSUITE** | ALEX YANKAUER
- **CARAVEL** | FRANK HERR, JAKE WATERS

## NETSUITE SOLUTION

- **NETSUITE** | FINANCIALS
- **MODULES** | FINANCIALS, RECORD TO REPORT, PROCURE TO PAY, NETSUITE PLANNING & BUDGETING
- **INTERFACES** | BANKING, CONCUR, CERIDION, AMEX

## IMPLEMENTATION

- **TIMELINE** | 4 MONTHS
- **METHODOLOGY** | SUITE SUCCESS
- **APPROACH** | RPIA WILL DEPLOY NETSUITE IN A SINGLE-PHASE WITH CORE ERP + NSPB GOING LIVE IN MONTH FOUR WITH A NUMBER OF OTHER THIRD PARTY SYSTEMS

