



**SageView**

SageView Advisory Group is an SEC-Registered Investment Advisory firm (RIA) serving retirement plan sponsors and individuals throughout the United States since 1989. SageView advises on 401(k), 403(b), 457, defined benefit and deferred compensation plans, and provides comprehensive wealth management services to individuals and families. SageView is headquartered in Newport Beach, California, and has more than 30 offices nationwide.

### DEMOGRAPHICS

- **INDUSTRY** | FINANCIAL SERVICES
- **HEADQUARTERS** | NEWPORT BEACH, CA
- **FOUNDED** | 1989
- **EMPLOYEES** | 180+
- **EXISTING ERP** | QUICKBOOKS
- **OTHER SYSTEMS** | DYNAMICS 365, PAYCHEX, ENVESTNET

### SALES TEAM

- **NETSUITE** | COLBY ARKIN
- **CARAVEL** | SCOTT CURRY, CAILA COHEN

### NETSUITE SOLUTION

- **NETSUITE** | SUITESUCCESS FINANCIALS 1<sup>st</sup> PRM
- **MODULES** | RECORD TO REPORT, PLANNING AND BUDGETING, PROCURE TO PAY, ORDER TO CASH
- **INTERFACES** | BANKING, PAYCHEX, DYNAMICS 365, ENVESTNET, PAYMENT GATEWAY, CSI

### IMPLEMENTATION

- **TIMELINE** | 5 MONTHS
- **METHODOLOGY** | SUITESUCCESS + OPTIMIZATION
- **APPROACH** | SAGEVIEW WILL DEPLOY NETSUITE IN A SINGLE PHASE WITH CORE FUNCTIONALITY GOING LIVE IN MONTH 5 AND INTEGRATING TO VARIOUS 3RD PARTY SYSTEMS IN PHASE 1.