



Toroso Investments

Toroso Investments is an innovative registered investment advisor, dedicated to understanding, researching, and managing assets within the expanding ETF universe. Their investment philosophy emulates many of the values and benefits inherent in ETFs, such as transparency, liquidity, and tax efficiency.

DEMOGRAPHICS

- **INDUSTRY** | FINANCIAL SERVICES
- **HEADQUARTERS** | MASSAPEQUA, NY
- **FOUNDED** | N/A
- **EMPLOYEES** | 30+
- **EXISTING ERP** | QUICKBOOKS
- **OTHER SYSTEMS** | HUBSPOT, BILL.COM, EXCEL, TRINET, CIBC, SHAREPOINT

SALES TEAM

- **NETSUITE** | GABRIEL CASTAGNA, ROB MOLINARO
- **CARAVEL** | FRANK HERR, JAKE WATERS

NETSUITE SOLUTION

- **NETSUITE** | SUITESUCCESS FINANCIALS 1ST STD
- **MODULES** | FINANCIALS, RECORD TO REPORT, PROCURE TO PAY, ORDER TO CASH, NSPB
- **INTERFACES** | BANKING, BILL.COM, AMEX

IMPLEMENTATION

- **TIMELINE** | 6 MONTHS
- **METHODOLOGY** | SUITESUCCESS + OPTIMIZATION
- **APPROACH** | TOROSO INVESTMENTS WILL DEPLOY NETSUITE IN A SINGLE PHASE WITH CORE FUNCTIONALITY GOING LIVE IN MONTH SIX. THIRD PARTIES WILL BE LIMITED IN PHASE 1

