

**WOLFE  
RESEARCH, LLC**

Wolfe Research, LLC, is a premier research boutique and affiliated broker dealer with a commitment to best-in-class products and ongoing strategic growth. Our 24 equity research analysts are each well distinguished and highly ranked and produce research that we believe is the most objective and distinguished in their sectors.

We deliver our services with care and specificity to each of our institutional clients. We do not try to be all things to all clients, but we do aim to be the best at everything we do.

**DEMOGRAPHICS**

- **INDUSTRY** | FINANCIAL SERVICES
- **HEADQUARTERS** | NEW YORK, NY
- **FOUNDED** | 2008
- **EMPLOYEES** | 220+
- **EXISTING ERP** | QUICKBOOKS
- **OTHER SYSTEMS** | SALESFORCE, MINERALTREE, CHROME RIVER, TRINET, CIBC, BNB, TRANSFERWISE

**SALES TEAM**

- **NETSUITE** | BLAKE FAMULARO
- **CARAVEL** | SCOTT CURRY, CAILA COHEN

**NETSUITE SOLUTION**

- **NETSUITE** | SUITESUCCESS FINANCIALS 1ST CLD
- **MODULES** | FINANCIALS, ONEWORLD, GENERAL LEDGER, RECORD TO REPORT, INVOICE TO PAY, ORDER TO CASH
- **INTERFACES** | BANKING, SALESFORCE, CHROME RIVER, TRINET

**IMPLEMENTATION**

- **TIMELINE** | 4 MONTHS
- **METHODOLOGY** | SUITE SUCCESS + OPTIMIZATION
- **APPROACH** | WOLFE RESEARCH WILL DEPLOY NETSUITE IN A SINGLE-PHASE APPROACH WITH CORE FUNCTIONALITY AND INTEGRATING TO VARIOUS 3<sup>RD</sup> PARTY SYSTEMS IN MONTH 4.