



iTrust

iTrustCapital, named the best Crypto IRA Platform in America, is helping investors access Crypto, Gold, and Silver Assets within their Roth, SEP, and Traditional retirement accounts. Securing more than \$2 Billion Dollars for tens of thousands of clients, iTrustCapital is revolutionizing the retirement account industry.

### DEMOGRAPHICS

- **INDUSTRY** | FINANCIAL SERVICES
- **HEADQUARTERS** | IRVINE, CA
- **FOUNDED** | 2018
- **EMPLOYEES** | 100+
- **EXISTING ERP** | QUICKBOOKS
- **OTHER SYSTEMS** | PAYLOCITY, INTERNAL DATABASE (REVENUE PLATFORM)

### SALES TEAM

- **NETSUITE** | JACK SHEARER
- **CARAVEL** | SCOTT CURRY, CAILA COHEN

### NETSUITE SOLUTION

- **NETSUITE** | SUITESUCCESS FINANCIALS 1<sup>st</sup> STD
- **MODULES** | RECORD TO REPORT, PROCURE TO PAY
- **INTERFACES** | BANKING, PAYLOCITY, INTERNAL REVENUE PLATFORM, OCR (SQUAREWORKS)

### IMPLEMENTATION

- **TIMELINE** | 3-4 MONTHS
- **METHODOLOGY** | SUITESUCCESS + OPTIMIZATION
- **APPROACH** | ITRUST WILL BE DEPLOYING NETSUITE IN A 3-4 MONTH TIMEFRAME MIGRATING ITS FINANCIALS OPERATIONS ONTO NETSUITE WHILE ESTABLISHING KEY INTEGRATIONS TO VARIOUS SYSTEMS FEEDING NETSUITE INCLUSIVE OF THEIR INTERNAL REVENUE PLATFORM.