CARAVEL
BPM Technology Solutions

Customer **PROFILE**

Modera Wealth Management

MODERA WEALTH

Modera Wealth Management is a fee-only, fiduciary financial advisory firm focused on providing clients with a high level of care and attention. They examine and evaluate each client's entire financial picture, offer prompt responses to their questions, and present customized solutions that always put their interests before their own.

Demographics

INDUSTRY Financial Services

HEADQUARTERS Boston, MA

FOUNDED 1983

EMPLOYEES 200+

EXISTING ERP QuickBooks

OTHER SYSTEMS SFDC, Airbase, ADP, Stripe

NetSuite Solution

NETSUITE Financials First Premium

MODULES Financials, Procure to Pay

INTERFACES Banking, ADP, Airbase, Stripe, Tamarac

Sales Teams

NETSUITE Blake Naivar, Bryan Daley

CARAVEL Corey Ruane, Rob Cupka

Implementation

TIMELINE 3-4 months

METHODOLOGY SuiteSuccess + Optimization

APPROACH Modera Wealth Management will Deploy NetSuite in a multi-phase approach with core functionality going live in 3 to 4 months, and integrating with various 3rd party systems.

ORACLE NETSUITE PARTNER OF THE YEAR 2023 NORTH AMERICA ALLIANCE PARTNER OF THE YEAR – SERVICES

ORACLE NETSUITE PARTNER OF THE YEAR 2022 NORTH AMERICA ALLIANCE PARTNER OF THE YEAR - SERVICES

ORACLE NETSUITE PARTNER OF THE YEAR 2021 VERTICAL ALLIANCE OF THE YEAR SERVICES

ORACLE NETSUITE PARTNER OF THE YEAR 2020 VERTICAL ALLIANCE OF THE YEAR - HI-TECH

CONTACT US
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