



ROTHSCHILD
WEALTH PARTNERS | SINCE 1908

CUSTOMER REFERENCE **WEBINAR**



TODAY'S CUSTOMER WEBINAR



1. Panel Discussion



2. Guest Customer



3. Erp Journey



Speaker Panel



Curtis Ellergodt
CFO
Rothschild Wealth Partners

Curtis Ellergodt serves as Chief Financial Officer at Rothschild Wealth Partners, where he has been a key member of the executive team for 10 years. Prior to joining Rothschild, Curtis built a strong foundation in public accounting, culminating in his role at Ernst & Young (E&Y). He holds an MBA from the University of Chicago's Booth School of Business and earned his BBA from the University of St. Francis, where he majored in Accounting with minors in Finance and Economics.



Scott Curry
Managing Partner
Caravel

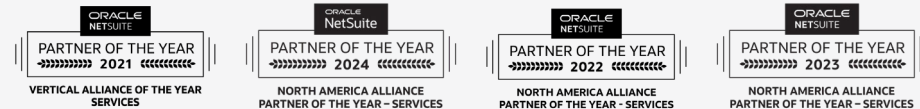
Scott works with clients on business process strategy, software selection, implementation and managed services. As a former CPA and Financial Operations Principal, Scott has a broad background including finance, distribution, manufacturing, eCommerce, CRM and HCM. Scott works with various software, high-tech manufacturing, semiconductor, renewable energy, retail, multi-channel distribution, services, consumer products, life sciences, gaming and social networking companies. Scott has held various positions in his career and worked directly for some of the world's largest software companies such as Oracle and NetSuite.



About Caravel

850+

Net New NetSuite Implementations



ADVISORY

Health Check Assessment
Business System Assessment
Technology Roadmap Development



SUPPORT

Compliment ACS or Internal Support
Functional Technical Support Desk
Access to Original Consultants



IMPLEMENTATION

Scalable Deployment Models
business optimization Focus
User Adoption Enablement



EXTENDED

Accounting Services
Assurance & Tax Services
Cybersecurity & General IT Services

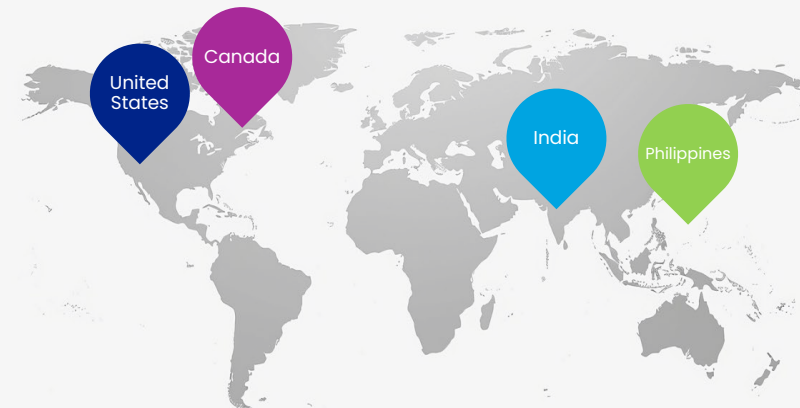
ORACLE
NETSUITE



boomi

workato

MuleSoft



CARAVEL
BPM Technology Solutions

About **ROTHSCHILD WEALTH PARTNERS**



BUSINESS DESCRIPTION

Rothschild Wealth partners provides comprehensive financial advice to high- and ultra-high-net-worth clients.

65
EMPLOYEES

**Oak Brook
Illinois**
HEADQUARTERS

**Financial
Services**
INDUSTRY



ERP JOURNEY



EXISTING SYSTEMS

QuickBooks

Legacy AccPac (Sage)

Excel



BUSINESS PAINS

Multiple reporting entities, only way to consolidate was in Excel

Existing tools didn't have any forecasting/budgeting capabilities, had to be done in Excel

Simply had outgrown our current systems



ERP GOALS

Streamline current finance/accounting function, while redesigning it to align with future needs

Ability to add additional business functions in the future within a single system

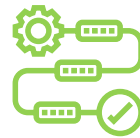


SELECTION PROCESS



VENDORS CONSIDERED

Sage



PROCESS

Searched for a partner that could provide everything now and, in the future, as we look to grow

Became evident early on in discussions with vendors (both ERP and implementation specialists) who was the most knowledgeable about our industry, our needs, and could adequately address them



DECISION CRITERIA

Which product offered the most robust tools

NSPB was an added benefit as our previous budgeting was all done in Excel, and more luck than anything

Which tool would provide us with the most in-depth analysis, ability to report as needed for board and bank



WHY NETSUITE & CARAVEL



WHY NETSUITE

- NetSuite was highly informed and able to answer all our questions
- Demos were better than any other vendor we looked at
- Ultimately, the whole package including NSPB sold us; though costlier, knowing we were working with the best was easy to overlook cost

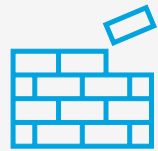


WHY CARAVEL

- Came highly recommended by NetSuite
- Initially worked with Scott who was dialed in and able to answer all questions, and provide insights for how we should think about things
- Everybody we've worked with has been great. We've worked with other implementation partners in the past for other technologies and more times than not were left disappointed. Without a doubt this was not the case with Caravel.



ERP BENEFITS



FOUNDATION

Platform for growth



LEADING PRACTICES

Adopt leading
practices & controls



VISIBILITY

Timely access to data
& improved reporting



IT'S A WRAP!



Q&A



UPCOMING WEBINARS

Timbers Customer Reference Webinar 4/17
Aurion Customer Reference Webinar 4/29



Caravel Contacts

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Thanks!