



Industry: Financial Services

Aspen Standard Wealth



Aspen Standard Wealth is a New York City-based holding company founded in April 2024 that acquires successful Registered Investment Advisors (RIAs). Led by CEO Aly Kassim-Lakha, the company positions itself as a permanent partner for wealth management firms, preserving their unique cultures while providing resources for growth. Since its launch, Aspen has made notable acquisitions including Summitry and New England Private Wealth Advisors, collectively representing over \$5.7 billion in assets under management. Backed by Alpine Investors, the company employs approximately 19 people and emphasizes long-term partnerships rather than reselling acquired firms.

HQ: New York, NY **Founded:** 2024 **Employees:** 18

Existing ERP: QuickBooks

Other systems: Advyzon, Ramp, ADP, Squoia

Customer Challenges: Future state rapid growth on a supportable platform.

Deal Competitors: Intacct

Why we Won: NetSuite was the system preference.

Caravel teams:

Caila Cohen, Scott Curry

NetSuite Implementation

NetSuite sales team: Andrew Willets, Brianna Weinstein, Jackie Joelson, David Silver

NetSuite: Financials First

Methodology: SuiteSuccess + Optimization

Modules: Record to Report, Procure to Pay, Order to Cash

Interfaces: Banking, Ramp, ADP Sequoia, Advyzon

Approach: Aspen will deploy NetSuite in a single phase with core functionality going live in month 4 and integrating to various 3rd party systems in phase one.

