



CUSTOMER REFERENCE **WEBINAR**



TODAY'S CUSTOMER WEBINAR



1. Panel Discussion



2. Guest Customer



3. Erp Journey



Speaker Panel



Jim Kipp
Director of Finance
Modera

Jim has been with Modera Wealth Management since October of 2024. Prior to joining Modera Jim held positions responsible for accounting, reporting, budgeting, forecasting, product and profitability analysis, treasury, finance, strategy, M&A and financial modeling. Jim has worked for Price Waterhouse Coopers, Shaw Kipp & Company, BankBoston, FleetBoston, Bank of America, Citizens Bank. In my spare time I enjoy golf, pickleball, working-out, traveling and spending time with my family.



Caila Cohen
Partner
Carvel

Caila heads up Caravel's Solution Engineering team and works with clients in all stages of their system lifecycle - evaluation, implementation, support and optimization.

Caila is an Engineer by trade but spent many years implementing NetSuite for various types of organizations across verticals.



About Caravel

850+

Net New NetSuite Implementations



ORACLE
NETSUITE



boomi



ADVISORY

Health Check Assessment
Business System Assessment
Technology Roadmap Development



SUPPORT

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



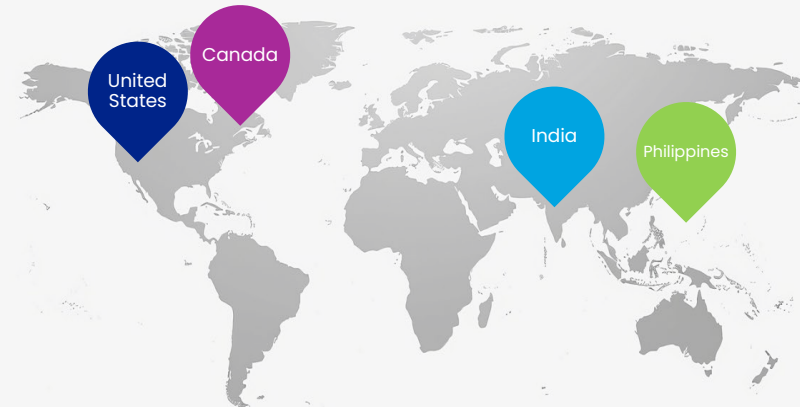
IMPLEMENTATION

Scalable Deployment Models
business optimization Focus
User Adoption Enablement



EXTENDED

Accounting Services
Assurance & Tax Services
Cybersecurity & General IT Services



CARAVEL
BPM Technology Solutions

About MODERA WEALTH



BUSINESS DESCRIPTION

Financial Advisory firm, helping customers plan with financial advice related to investment management, retirement planning, taxes, insurance needs.

225
EMPLOYEES

**Westwood
New Jersey**
HEADQUARTERS

**Wealth
Management**
INDUSTRY



ERP JOURNEY



EXISTING SYSTEMS

Airbase

QuickBooks

Microsoft Office

Tamarac



BUSINESS PAINS

Revenue recognition and
accounts receivable tracking in
NetSuite

Financial consolidations and
dimensional reporting

3rd party integrations



ERP GOALS

Cloud-based solution

Single instance

Single source of truth for data and
reporting



WHY NETSUITE & CARAVEL



WHY NETSUITE

- More robust financial solution
- More automated data entry
- Ability to onboard and consolidate with new acquisitions
- Integration capabilities with third party applications

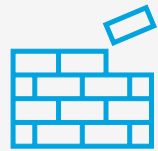


WHY CARAVEL

- Industry expertise
- Integration experience with Salesforce and Tamarak
- Caravel's experience with other wealth management clients



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

- Oklo – July 10
- Nationwide Organ Recovery Transport Alliance – July 31



Caravel Contacts

Scott Curry
Managing Partner
scurry@bpm.com

Caila Cohen
Partner
ccohen@bpm.com



Thanks!