



# Industry: FINANCIAL SERVICES

## Balance Partners



Balance is a highly diversified underwriting platform that empowers entrepreneurial organizations to thrive, build wealth, and leverage the advantages of being part of a larger, collaborative community while striving to produce the best products and solutions for our insureds, brokers and capacity providers.

**HQ:** New York, NY. **Founded:** 2019 **Employees:** 51-200

**Existing ERP:** QuickBooks

**Other systems:** Bank of America, Vertafore

**Customer Challenges:** N/A

**Deal Competitors:** N/A

**Why we Won:** N/A

**Caravel teams:**  
Rob Cupka

## NetSuite Implementation

**NetSuite sales team:** Adrian Saravia, Debbie Hill

**NetSuite:** Financials First

**Methodology:** SuiteSuccess + Optimization

**Modules:** Record to Report, Procure to Pay, Order to Cash, Planning & Budgeting

**Interfaces:** Banking, Agency Management

**Approach:** Balance partners will deploy NetSuite in a single phase with core functionality going live in month 4.

