



Advanced Markets Group

AMG developed its Direct Market Access (DMA) model enabling qualified individuals and institutions to trade directly on prices streamed live by the world's leading FX banks and ECN platforms, all via a robust technology infrastructure with frontend and FIX API trading interfaces. The firm is institutionally owned by Macquarie Bank, BGC Partners, and firm management and is headquartered in Charlotte, North Carolina, USA. AMG is licensed in the UK by the Financial Conduct Authority (FCA) and in Australia by ASIC.

DEMOGRAPHICS

- **INDUSTRY** | FINANCIAL SERVICES
- **HEADQUARTERS** | CHARLOTTE, NC
- **FOUNDED** | 2006
- **EMPLOYEES** | 50
- **EXISTING ERP** | QUICKBOOKS
- **OTHER SYSTEMS** | SALESFORCE, EXPENSIFY, FORTEX

SALES TEAM

- **NETSUITE** | GABE CASTAGNA
- **CARAVEL** | FRANK HERR, JAKE WATERS

NETSUITE SOLUTION

- **NETSUITE** | FINANCIALS
- **MODULES** | FINANCIALS, RECORD TO REPORT, PROCURE TO PAY, ORDER TO CASH
- **INTERFACES** | BANKING, EXPENSIFY, TIPALTY

IMPLEMENTATION

- **TIMELINE** | 4.5 MONTHS
- **METHODOLOGY** | SUITE SUCCESS
- **APPROACH** | ADVANCED MARKETS WILL DEPLOY NETSUITE IN A SINGLE PHASE WITH CORE FUNCTIONALITY GOING LIVE IN MONTH 5 WHILE SIMULTANEOUSLY INTEGRATING WITH TIPALTY AND EXPENSIFY. INTEGRATION WITH FORTEX TO BE ASSESSED IN A PHASE TWO

