



ASPIRIANT

At Aspiriant, we've invested a vast amount of thought and energy into structuring our firm to be unique – and better. Aspiriant's clients benefit from the intellectual ferocity, loyalty, and passion of our people.

You see, Aspiriant is built to attract the most talented people in wealth management and make them owners, so they stay forever. We've structured our firm to look and operate like no other in the business and to create a phenomenal experience for the people we serve.

DEMOGRAPHICS

- **INDUSTRY** | FINANCIAL SERVICES
- **HEADQUARTERS** | LOS ANGELES, CA
- **FOUNDED** | 2007
- **EMPLOYEES** | 200+
- **EXISTING ERP** | QUICKBOOKS ENT PROF.
- **OTHER SYSTEMS** | EXCEL, BLACK DIAMOND, PROJECTOR PSA, SALESFORCE, SAGE FIXED ASSETS, ADP, COMERICA, TABLEAU

SALES TEAM

- **NETSUITE** | COLBY ARKIN
- **CARAVEL** | SCOTT CURRY, CAILA COHEN

NETSUITE SOLUTION

- **NETSUITE** | SUITESUCCESS FINANCIALS 1ST PRM
- **MODULES** | RECORD TO REPORT, AP INVOICE TO PAY, AR INVOICE TO CASH
- **INTERFACES** | BANKING, PROJECTOR PSA, ADP, TABLEAU

IMPLEMENTATION

- **TIMELINE** | 4 MONTHS
- **METHODOLOGY** | SUITESUCCESS + OPTIMIZATION
- **APPROACH** | ASPIRIANT WILL DEPLOY NETSUITE IN A SINGLE-PHASE WITH CORE FUNCTIONALITY GOING LIVE IN MONTH 4 AND INTEGRATING TO VARIOUS 3RD PARTY SYSTEMS IN PHASE 1.