SYCAMORE

Your firm's hub of efficiency

One **native-Salesforce** platform for managing all your primary business functions. The **only one** built by finserv industry veterans.

Effortlessly harness the power of your data

Make compliance reporting and exams a breeze

Keep your advisors connected, delighted and productive

Efficiently manage:

salesforce

Data & Analytics

Compliance & Audits

Advisor Compensation

Advisor Management

Client Management

We help Broker-Dealer & RIA executives overcome the challenges of:

✖ **Data silos, ownership and portability**

✖ **SEC/FINRA compliance and exam risk and cost**

✖ **Stagnant profitability, growth and ability to scale**

by:

✚ Acquiring and normalizing the right data to meet multiple compli-ance, operational and advisor requirements

✚ Efficiently and accurately meeting regulatory reporting requirements and responding to audit or exam requests

✚ Enabling firms to attract, retain and manage advisors while providing tools to help them produce and grow

Contact:

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