

SOLUTIONS FOR GROWTH: STREAMLINE OPERATIONS



When it comes to investment management operations, it's all too easy for administrative duties to overtake the actual management of investments. Archer combines technology with right-sized outsourcing capabilities, improving investment management efficiencies and operating margins. Archer's cloud-based technology automates key processes including reconciliation, document management, activity tracking, and performance management. Your team accesses a single book of records, while our workstream tools automatically connect investment decisions to account actions. And where your team needs support, our expert operations team is at the ready. Archer works alongside your team to help them meet your clients' requests. Archer support frees your team to focus on growth.

THE CHALLENGE

An investment firm with an institutional and high-net-worth distribution focus offered one retail SMA product that required a separate accounting and trading system. Each new account required entries to multiple systems to accommodate billing, asset reporting, performance composites, and other firm-level integrations. Additionally, through an acquisition, the firm gained additional products that were run from various locations on other operating systems. The resulting operational complexity to support multiple processes, systems, and locations taxed resources and distracted from the business of investment management.

THE SOLUTION

Archer's total solution of operational services and robust, web-based enterprise application software provided unifying technology while expertly supporting day-to-day operations. With greatly simplified operations across products and distribution streams, resources were unlocked to focus on investment management and growing revenues. The firm's Chief Operating Officer noted that with Archer as a resource, they improved their scalability for new business and new products.