SYCAMORE

A New Way to Manage All of Your Wealth Firm's Data

Data is the lifeblood of your business. And data done right, can be a huge differentiator.

We do data right!

Home offices and advisors need to gather, access and share, clean, high-quality data. Anytime, anywhere.

Today, **wealth firms are relying on data to support and enable the growth of their businesses.** From gathering data via automated processes and workflows like customer onboarding; to paying advisors for those customers that have been onboarded; to leveraging a rules engine and Tableau artificial intelligence to assist with overseeing and meeting compliance suitability and surveillance obligations, data hub is the engine.

Without a solid data framework, the above tasks become a lot more difficult, resource intensive and expensive.

Access clean data each morning to drive workflows and boost team productivity

SPEED	QUALITY	EFFICIENCY

Break free
from the traditional wealth firm data silos model

It can take a firm as many as **6 to 8 hours per day to process and normalize data manually,** or an entire day of staff time.
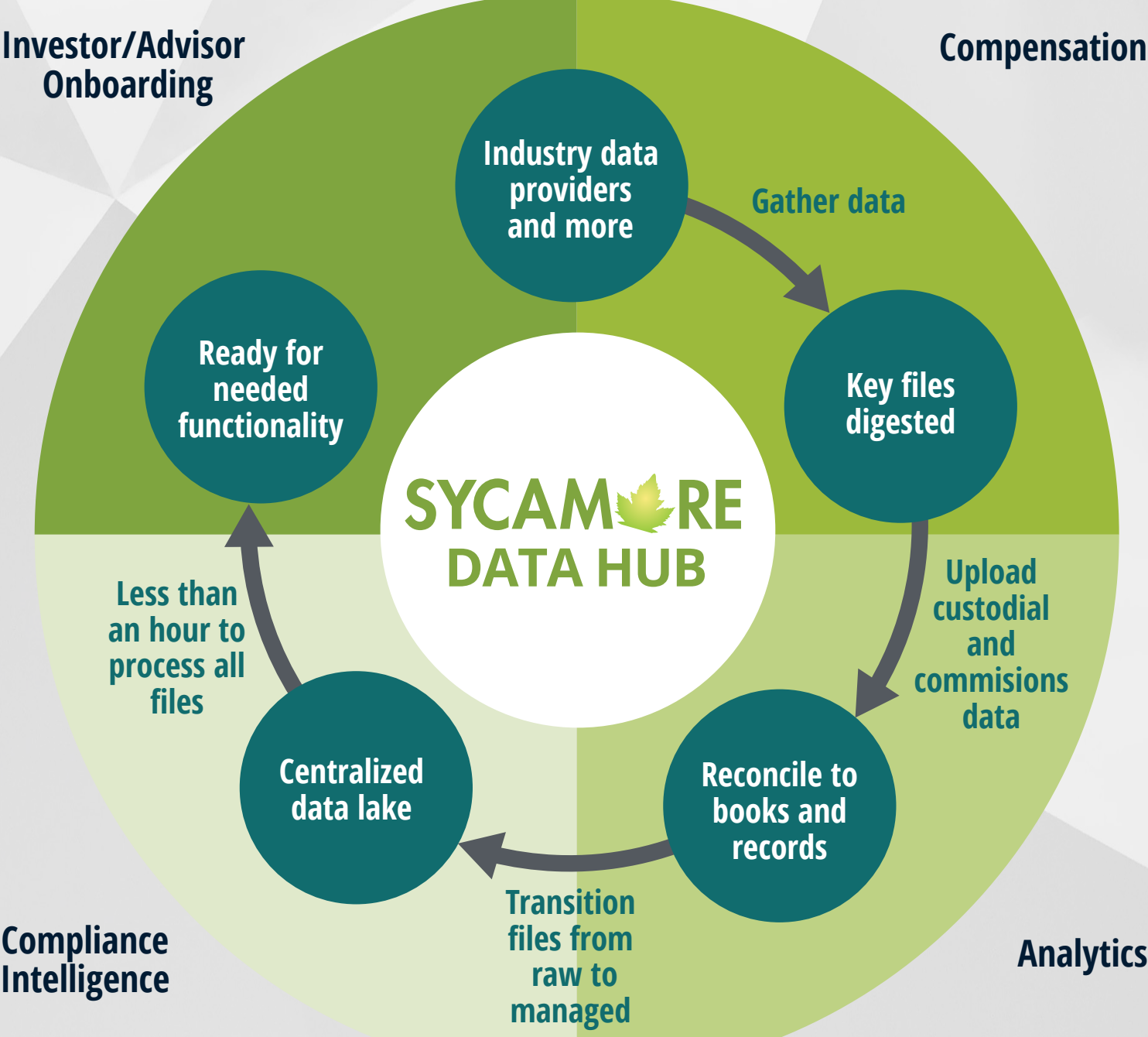
Along the way, **data errors enter the cycle due to manual effort,** missing files, and erroneous or duplicated data going unnoticed, leading to increased risk and questionable data integrity.

Sycamore Data Hub automates the entire data loading process –

From file retrieval across all possible sources to loading and status reporting.

Each morning, your operations, compliance, and advisor teams have the most current and accurate data possible to conduct their day's work, while management gains instant access to the analysis and dashboards they need to drive decisions.

Investor/Advisor Onboarding

Compensation

Industry data providers and more

Gather data

Key files digested

Ready for needed functionality

SYCAMORE DATA HUB

Upload custodial and commisions data

Less than an hour to process all files

Centralized data lake

Reconcile to books and records

Transition files from raw to managed

Compliance Intelligence

Analytics

FAST
Our data loading process is fast – typically completed in less than one hour, end to end.

INTEGRITY
Our proven data loading and reconciliation process minimizes mistakes and limits bad data from entering your data hub that could potentially impact operational workflows.

SCALE
We normalize and deliver millions of records every day for each of our clients.

SMART DATA
Our process never skips steps, forgets to perform tasks, or overlooks a data discrepancy – leading to better decision making. We have Tableau Artificial Intelligence helping us. one hour, end to end.

ACCESSIBLE BY ROLE
Your clean, normalized data files arrive each morning, ready for your people to work with and feed your firm's daily operations.

SECURE
Our data aggregation and centralized storage are highly secure, complete with multi-level encryption, firewalls, servers, and redundancy to ensure business continuity.

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