

Overview

Today's financial services firms manage a broad range of innovative products designed to enhance and protect the portfolios and wealth of their clients. Success in this environment requires access to the most current and sophisticated business intelligence available.

Financial services companies have become increasingly aware of the critical role that quality data plays in regulatory compliance, client services, and business decision-making, driving increased demand for automated solutions and IT-related support. However, in-house IT and Development teams often face a shortage of available resources to deliver on these requests. When it comes to outsourced professional services, Unlimited Innovations (UI) is a valuable partner in delivering end-to-end projects or in supplementing internal resources.

Business Knowledge That Makes a Difference

UI's Finance Professional Services team delivers cost-efficient custom software development, workflow solutions, and outsourced IT services to the financial services industry. Our versatility and breadth of experience offer a unique combination of strengths that differentiate us from large consulting firms and other specialized IT companies.

- Rapid Development & Deployment** - UI's Finance Professional Services team provides clients with high-quality deliverables in about half the time it takes larger consulting firms. Our domain expertise in financial services, knowledge of software solutions, and data integration, project management, and proprietary reusable modules mean we can quickly ramp up to meet our clients' operations and business requirements. Simply stated, we ramp up quickly, so we get working on your project sooner, and our customizable tool kit helps us develop and complete projects in a shorter time frame.
- Domain Expertise** - Our pool of talented resources is trained in financial services and business processes. We provide a complete project assessment and execution team, not just a set of programmers and IT specialists. Our business analysts and software developers are experts in financial business applications, product offerings, and integration with a range of systems including:
 - Bloomberg
 - Longview
 - Charles River
 - Advent Geneva (Accounting System)
 - EZECastle (Trading System)
 - Electra (Reconciliation System)
 - Salesforce (CRM)
 - Avenue/Saratoga (CRM)
 - NETIK (Data Warehouse/BI/Security Master)
 - Sasquatch
 - Mellon
- Data Interface Expertise** - Many financial services applications and business processes require the import of data. Our technical team is highly qualified in providing integration between multiple systems, and has created reusable components for systems integration.
- Client Experience** - Our client experience has resulted in expertise in financial regulation and compliance, as well as best practices in the financial sector. We have worked with asset management firms, institutional investors, private investment firms, and financial services providers.
- Onshore / Offshore Model** - We use an Onshore / Offshore project model to deliver maximum benefits. Unlimited Innovations is a California company; the local team is the primary point of contact to our clients. We provide the liaison to our offshore resources, providing our clients with cost efficiencies without sacrificing quality or turnaround times.



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Supplier Excellence Award

Supplier Excellence Award - 2005
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Custom Applications

UI brings experience in developing custom applications, including the following:

- Regulatory compliance
- Client-specified compliance (pre-trade)
- Manual trade support (including exotic, CUSIP, Non-CUSIP)
- Real-time trade blotter
- Customer portals (brokers, direct clients)
- Client-facing & internal reporting
- Complex calculation engines to support reporting

Examples of Finance Professional Services Deliverables

- Production support platform
- Data mining / business intelligence
- Reusable interface frameworks
- Client portals
- Portfolio management portals
- Internal reporting portals
- Dashboards for decision makers / portfolio managers
- Nightly monitoring / backup / migrations with 24-hour support
- Data integration
- Data warehousing
- Data services such as Security Master Regulatory
- Compliance support and solutions
- Predictive modeling
- Integration of mobile applications for capital markets
- Loan performance system development to assist MBS in decision making

Key Benefits of Working with UI's Finance Professional Services Team

- Value-driven, cost-efficient solutions
- New trading systems implementation and support
- Pre- and post-compliance support
- Market data and provider systems integration with trading, accounting and reconciliation systems
- Improved client service and user satisfaction
- Rapid cycle times and efficiencies
- Quality solutions delivered efficiently and effectively
- US-based project management and customer liaison
- Offshore development team supplements local technical staff, providing cost advantages and 24 x 7 development for accelerated schedule
- Significant technical and business resources provide clients with a pool of finance talent that can phase in and out of projects as needed
- Tools and processes to implement Systems Development Life Cycle (SDLC) best practices
- Reconciliation products experience

About UI Finance Professional Services

Unlimited Innovations' Finance Professional Services delivers cost-efficient custom software development, workflow solutions, and outsourcing services to the financial services industry. Our versatility and breadth of experience offers a unique combination of strengths that differentiate us from large consulting firms and specialized IT companies including rapid development and deployment capabilities, domain expertise, data interface expertise, and client experience.

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