



**Madison Avenue Securities, LLC<sup>®</sup>**  
Member FINRA/SIPC, a Registered Investment Advisor

## OVERVIEW

San Diego, Calif.-based boutique RIA and broker-dealer seeking to increase data accuracy, accessibility and recovery; improve back-office efficiency; and enhance the productivity of more than 160 affiliated financial advisors across 100 U.S. locations by adopting to a FINRA-compliant, paperless office environment.

- ▶ 28 employees plus 160+ affiliated advisors
- ▶ Arcus played a significant role in the development and roll-out of the firm's central native-Salesforce platform, Omnio Pro

## RESULTS & IMPACTS

- ▶ Improves accuracy and real-time visibility of data within Salesforce
- ▶ Accelerates processes and significantly reduces the paperwork burden on advisors and back-office staff
- ▶ Delivers an end-to-end, paperless client onboarding experience
- ▶ Provides assurance of FINRA and SEC compliance for record retention
- ▶ Protects and restores data, document and programming loss across the entire system
- ▶ Maximizes user adoption and smooth transition upon release



With expertise in financial services, data-driven operations and technology, along with its native-Salesforce Finity360 solutions, Arcus Partners is helping our advisors and back-office teams increase efficiencies remotely, digitally transform their paper-intensive processes in a compliant manner, and ensure a high level of user adoption of our Omnio Pro platform.”



▶ **Casey Cotton**, Chief Technology Officer, Madison Avenue Securities, LLC



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## WHAT WE PROVIDED

- ▶ A new data integrity process via [Arcus360](#) services: Auto-fill and automatic calculations ensuring standardized method for advisors and back-office staff to enter data
- ▶ [Finity360 Docs](#), which provides a fully digital document management and new account opening/client onboarding process, auto-indexed and FINRA-compliant retention, and integrated e-signatures
- ▶ [Finity360 Recovery](#) for complete back-up and recovery of all the data elements including fields, configurations, documents and programming
- ▶ Design and development of business workflows and reports based on multiple Salesforce Lightning components
- ▶ Training for back-office and front-office staff

## ADDITIONAL INFORMATION

- ▶ [Arcus Partners](#)' Finity360 solutions, and Arcus360 services providing workflow creation and user training, are part of the success of Madison Avenue Securities' Omnio Pro platform which integrates [Sycamore Company](#)'s advisor management, compensation, compliance and CRM functions
- ▶ Seamlessly connects with multiple third-party applications to retrieve the data from different custodians
- ▶ Provides limitless functional and integration possibilities due to an open, cloud-based architecture

*Securities and Advisory services are offered through Madison Avenue Securities LLC. (MAS) A Registered Investment Advisor, Member FINRA/SIPC.*