

CO-SOURCING

Your virtual back office

Accounting, Advisor Services and Back Office

FREEING UP YOUR TIME SO YOU CAN GROW YOUR BUSINESS

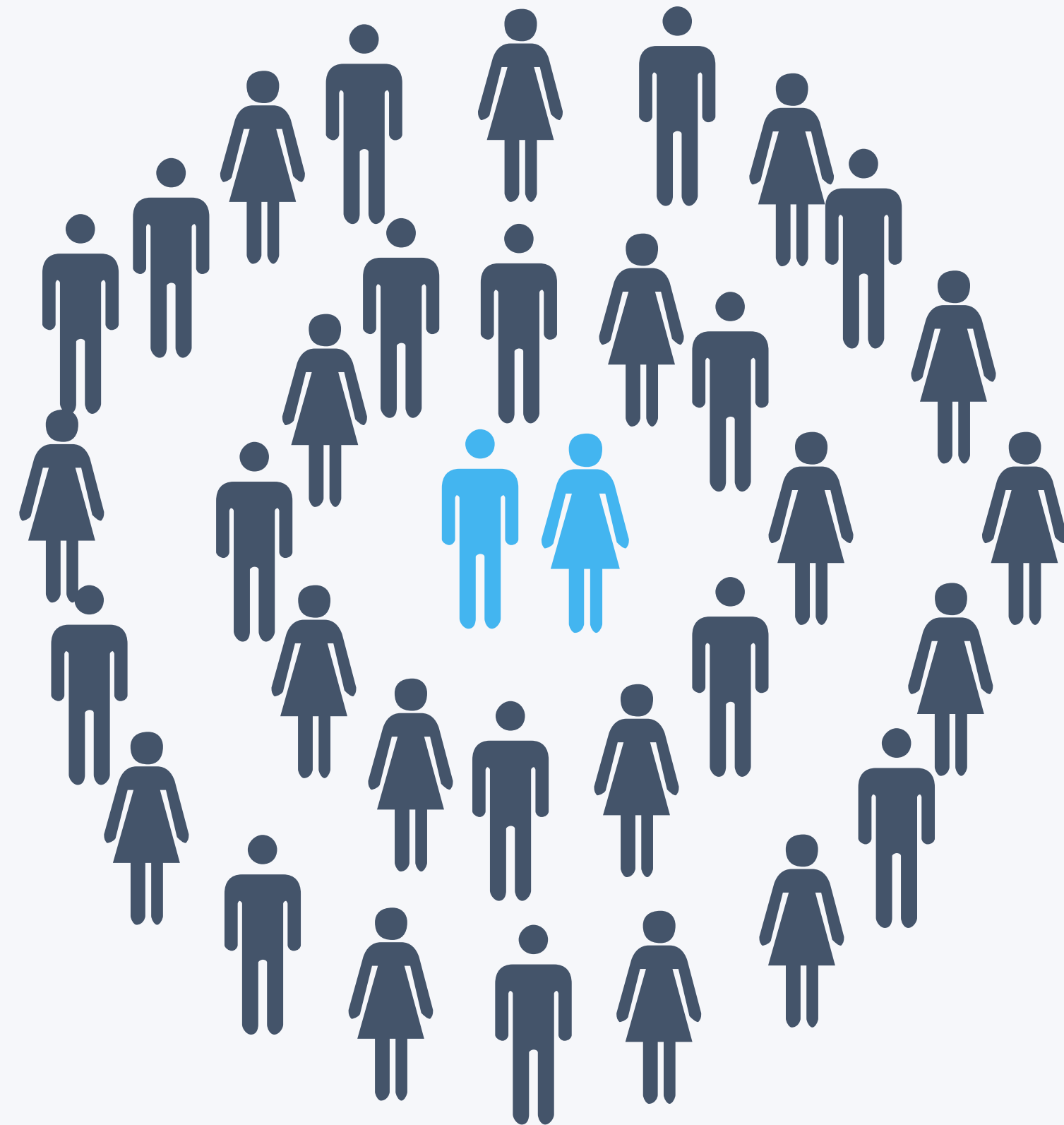


We inspire individuals and organizations to work more effectively and efficiently, and create greater choice in the domain of work, for the benefit of all concerned.

We will bring a positive impact to your business from day one. Helping you create your ideal work/life balance.

Your Virtual Team

INSIGHTS. ACTION. GROWTH



Constant Change is the new normal for the financial services industry today, and there's little reason to expect these roiling waters to calm anytime soon.

We are here to give you the competitive edge and help you move ahead.

In this environment, you have to be ready to act at a moment's notice. And that requires an ability to make smarter, more informed decisions, which is exactly what **i4** can help with.

Why Co-sourcing

INSIGHTS. ACTION. GROWTH

Co-sourcing a process or a function makes perfect business sense. Why? Because whatever isn't your core business can slow you down, incur extra costs, and requires lots of your time and attention. Co-sourcing solves that problem; all you need is a trusted partner to help you with the transition.

Co-sourcing is a viable business model because it declutters organization's, makes them leaner and more efficient. Here are a few more reasons why you should take advantage of outsourcing



Cost effectiveness

One of the most compelling reasons for co-sourcing is to cut costs. Cost-savings on resources can allow a businesses to save more than 50% on cost when outsourcing.



Increased efficiency

When you choose a co-sourcing partner you'll benefit in them delivering complex co-sourcing projects. Effectively the tasks you outsource are often completed faster and with better quality by professional, well-trained and motivated staff.



Access to skilled resources

With the right co-sourcing partner you will no longer have to deal with the traumas and vagaries of recruitment. Your co-sourcing team should have the necessary experience, to handle all your needs. Having a team with mixed skills gives you flexibility and saves you valuable time and money.



Concentrating on your core business

By co-sourcing your processes you will have more time to focus and strengthen your core business. It's essential for any business to concentrate on the parts of the business that deliver the margin and profit.



At i4, we are experts in making organizations more efficient. Whether it's through Business Process Management, Tax Preparation & Tax Planning, Bookkeeping, or Financial Planning, we have the knowledge and experience to provide customer services to you and your business.

Why i4

INSIGHTS. ACTION. GROWTH

We have always wondered; What if you were able to concentrate on your core competency and be able to generate more business? How would great life be if someone manages noncore but essential support system for you? What if we can provide you with skilled and experienced personnel on demand at highly competitive rates?

I4 is a co-sourcing organization to bridge the gap of your requirements of financial skilled personnel not JUST to reduce the cost of your operations but allow you to delegate important tasks to support your routine activities.

Our objective is mainly to provide expertise that you always wanted with Minimal training, Zero human resource maintenance and with NO fixed cost commitments.

We have strategic presence in India to access the best skills at attractive price in this increasingly flat world. I4 KP operates out of world-class infrastructure, seamless data and voice connectivity between geographical boundaries in a fully secured environment.

1

Team expertise: With our team of CFPs, CPAs, CFAs and MBAs there is no job to big or complex but we still have the flexibility to handle your day to day task.

2

Low-cost, low-risk way to employ additional resource – without the normal employment constraints

3

A more cost-effective infrastructure that better aligns your capacity and performance with the needs of the business.

4

Manage your resource directly or pass over processes to us and just monitor results

5

One cannot manage change. One can only be ahead of it. A customized solution with flexibility and full responsibility.

Services

Accounting Services

- Bookkeeping Entries
- Reconciliations
- Payroll Processing
- Finalization of Accounts
- Reporting

Accounting Projects

- Requirement based Accounting solutions
- Fixed cost- fixed duration projects
- Problem Solving Services

Tax Planning Support

- Income Analysis
- Tax Estimates
- Group tax plan
- Integrated and Other tax plan reports

Tax Preparation Services

- Individual Tax Preparation
- Corporate Tax Returns
- Partnership & Trust Tax Returns
- State returns
- Tax work papers

Financial Planning Support

- Portfolio Accounting
- Financial Plan generation
- Customized Investment Reports
- Advisor Billing
- Investment Account Paperwork

Broker Transition Support

- Pre-boarding
- On boarding tasks
- ADV regulatory filing
- Advisor Support requests
- Paperless Document storage

Research Projects

- Stocks & Mutual funds research
- Portfolio Analysis
- Niche Industry/Sector Research
- Economic Outlook
- PIPE/ Private Equity Deal Reviews

Other Back-office Support

- Data Clean-up
- Software Data Entries
- Redtail, Omniscient, SmartOffice, Act, & proprietary CRM's
- Digital Document Management

Engagement Models

ASSIST

Hourly Charges

- ✓ Pay by actual hour
- ✓ No fixed commitments
- ✓ Efficient for short projects
- ✓ Choose from the multiple skills to suite requirement
- ✓ Direct Reporting

ELEVATE

Fixed cost

- ✓ Cost depends on the project
- ✓ Full responsibility
- ✓ Efficient for well defined assignment
- ✓ No cost escalation
- ✓ Direct Reporting

ACHIEVE

Full Time Equivalent

- ✓ Dedicated Resource with quality supervision
- ✓ 160 Hrs. / Month
- ✓ Full redundancy
- ✓ Extension of your own office
- ✓ Direct Reporting

Thank you



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