



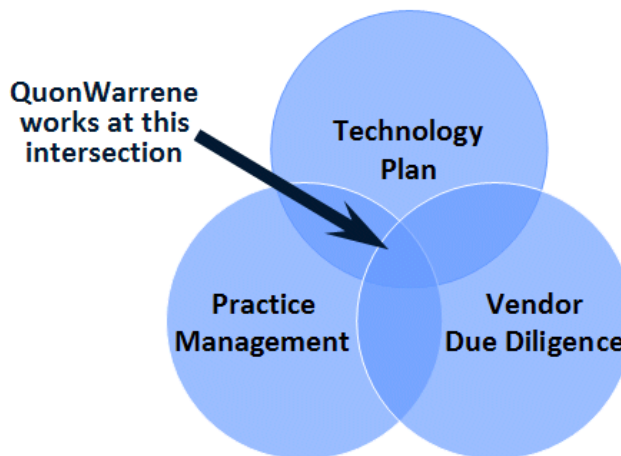
PRACTICE MANAGEMENT TECHNOLOGY CONSULTING FOR THE FINANCIAL SERVICES INDUSTRY

QuonWarrene provides financial institutions and their advisors with a blueprint for managing their practices, technology and more.

We bring a methodology that assesses your current systems and services environment with a keen eye toward growing your practice's technical capabilities to benefit you and your customers.

Similar to the financial planning process you employ when working with your clients, we gather, assess, analyze and make recommendations based on our interaction with you and your team.

Our experience allows us to go beyond generalized best practices recommendations related to financial services and deliver superior service.



TECHNOLOGY PLANNING

- We meet with you and learn about your practice
- Together, we complete an assessment questionnaire to capture your current status
- We identify your tactical & strategic goals
- We prepare a written assessment and comprehensive recommendations
- We deliver a report that includes a roadmap and timelines that can be incorporated into your business
- We offer due diligence and additional research and analysis services to help you attain your goals

QuonWarrene understands the critical nature of relationships and approaches technology as a meaningful element of freeing your time to interact with clients. We can help you at all levels-

- Getting more productive use out of your existing technology (spending less time on data entry and manipulation)
- Complete overhaul of your technology platform to meet growing business needs.

Let us show you how to structure your processes, workflow and systems so that they help you operate your business efficiently and spend more time with your customers.

QuonWarrene was founded by Neal Quon and Blane Warrene to address the lack of tactical and strategic services related to practice management technology in the financial services industry. The firm focuses on serving financial advisors and financial institutions by creating and implementing a roadmap to better leverage technology and assist them in scaling their operations and growing their businesses.

Neal and Blane's unique blend of "on-the-street" financial services knowledge and technology acumen, gathered over their collective 30 years experience in the industry, has enabled them to work at the highest levels with some of the premiere financial services firms in the United States.

QUONWARRENE'S THREE TIERS OF SERVICES

OUR THREE DISTINCT OFFERINGS ENABLE US TO ENGAGE WITH YOUR ORGANIZATION HOWEVER YOU CHOOSE.

1 **ADVICE**

Hourly consulting on an ad-hoc basis.

2 **TECHNOLOGY BLUEPRINT** (fixed fee pricing)

Our process includes a pre- and post-analysis meeting with you; an analysis via detailed questionnaire; and a thorough review and comprehensive report that includes a project plan and roadmap.

A narrative and visual deliverable that not only identify products and services that can meet your requirements and practice goals, but also reveal how to leverage the technology you already have in place, where applicable.

3 **ROADMAP SERVICES** (fixed fee pricing)

QuonWarrene offers an annual engagement that provides you with personalized access to our services for up to three hours each month. When you have questions, need guidance or other information... we are just an email or phone call away!

Additionally, we will schedule and host an anniversary review of your technology plan. This enables us to monitor your progress, assist with the evolution of your practice goals and processes, and deliver measured metrics to you.



Neal Quon: neal@quonwarrene.com

Blane Warrene: blane@quonwarrene.com

Phone: 330-423-0096

QuonWarrene is located at: P.O. Box 80100, Canton, OH 44708