

Asset Management



Global reach
Pinpoint delivery

SIONIC[®]

Global financial services specialists

Asset Management



Sionic is a global consulting firm.

Our focus is on change and we specialise in a unique blend of business and people performance.

We are agile, independent and hold a straightforward philosophy – that outstanding people produce outstanding work.

We tackle complex operational, economic and strategic problems, big and small, for clients dealing with evolving markets, changing risks, intricate regulation, cultural change, technology and digital advances.

At Sionic, we attract, nurture and promote only the finest people. We constantly create new partnerships that focus on broader horizons.

We are a global, sector-wide team of experts of longstanding pedigree, and one of the world's fastest growing independent consulting firms.

We have over 300 professionals based in more than a dozen locations worldwide, including America, Europe and Asia and we continue to expand at pace.

We deliver measurable value. When the world's leading firms in financial services are looking to accelerate their performance, they call us. Our practices are communities of expertise. Combined with our collaborative approach, this framework allows us to foster specialist talent and deliver cross-specialism expertise. Underpinning this is our commitment to offer exceptional client care and to deliver services that are client-responsive, designed to reduce costs, navigate complexity and accelerate business, technology and people performance.

www.sionic.com



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Our values

Our approach is rooted in our DNA. Our values determine our behaviour and how we work with our clients, partners and colleagues.

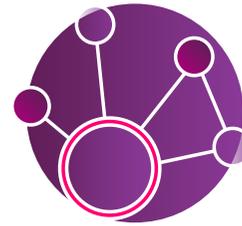
Global Collaboration | Pace & Ambition | Expertise with Integrity



“ We have a not-so-secret weapon: our people. Combined, they possess an incredible depth of knowledge and a unique ability to deliver that knowledge where clients need it most. We call it specialism at scale. ”

Craig Sher Chief executive officer

Our sectors



Asset management



Financial markets infrastructure



Private equity, real estate & trust administrators



Corporate & investment banking

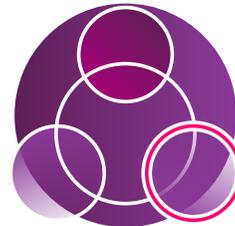


Insurance & reinsurance



Wealth management

Our practices



Asset management

We provide specialist advisory and implementation consultancy services covering strategy, business, operations and technology change.



Client lifecycle management

We are experts in the analysis, design and implementation of KYC including client onboarding, life-cycle management and off-boarding.



Data & technology

We specialise in data strategy, governance and management; technology architecture and organisation design, cyber and digital.



Finance & fund administration

We work with finance and asset servicing organisations to simplify and enhance process and data for analysis and reporting.



Financial crime & compliance

We help clients to manage their risks and responsibilities with regard to anti money laundering, terrorism, bribery, corruption and fraud.



Front office business lines

We support all aspects of front-office activity, enhancing client relationships, client services, client protection and the overall client experience.



Group risk & capital

We are expert practitioners in market, credit, counterparty, liquidity and funding risks, as well as leverage ratio and balance sheet management.



Learning & development

We accelerate improvements in results by building new capabilities and creating cultures of high performance.



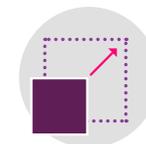
Operations

We specialise in operations strategy, operating models, business platforms, risk management and governance.



Regulation

We help clients to enhance, remediate and rationalise compliance and control, through technology, people and process improvements.



Transformation

We draw on our specialist knowledge and extensive industry experience to deliver meaningful and lasting organisational change.



Wealth management & private banking

We advise on proposition development, end-to-end business improvement, technology, risk and corporate governance.

Asset Management



Overview

We have extensive experience helping a wide range of leading asset and alternatives managers, pension funds, insurers and service providers to transform their business and operating models, technology enablers and strategy to meet the opportunities and challenges they face. Our specialist knowledge, pragmatic consulting style and delivery experience helps clients achieve significant business benefits and reduce delivery risk. Our assignments in the investments industry include end-to-end operating model design; outsourcing strategy and implementation for the front, middle and back-office; regulatory change; market research; benchmarking; product strategy and development; post-merger integration; and data management strategy, system selection and implementation.

Asset Management



Specialisms

Anti-money laundering (AML) & know your customer (KYC)

Benchmarking

Costs, fees & value for money

Data management

Distribution technology & client service

Implementation

Investment & front office

IT strategy

Market research

Operating model design

Outsourcing

Product / market strategy & development

Regulatory change

Research

System selection



Read a selection of our
latest **CASE STUDIES** >

Meet the experts



Paul Miller
Managing Partner

Meet Paul Miller, Sionic Managing Partner and asset management specialist

I lead a wide range of activities covering banking and market infrastructure, asset and wealth management, and our offshore capability. As a renowned specialist in the financial services industry with over 30 years' experience, I am often asked to be a trusted advisor to our clients, providing expert advice to senior executives and board members across a large range of complex advisory and delivery programmes. I work closely with project teams to ensure projects are successful and on budget. I am also well-known across the industry for chairing panels and judging industry awards.

ASSET MANAGEMENT

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Meet the experts



Paul Sutton
Managing Partner

I have consulted to the investments and wider financial services industry for around 25 years. During that time I have led assignments for a wide range of clients – from start-up boutiques through to global asset managers; hedge funds; life and pensions insurers; banks and wealth managers – covering areas such as operating model design, outsourcing, M&A, strategy and new business / product initiatives. Within Sionix I have a number of management responsibilities including being part of the global executive leadership group and co-leading the global asset management practice.

ASSET MANAGEMENT

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James Hockley
Partner

I've worked in financial services for over 30 years, starting off in banking and moving through investment management and more recently to consulting. In this time, I've worked for leading international banks such as JPMorgan and the Bank of New York, in both Europe and the far east, and global investment firms such as Schrodgers and Barclays Global Investors. Throughout my career I have advised the investment industry on creating the operating and servicing models that will best serve their increasingly complex business goals, whether as a banker to – or working for – such firms, or now as an advisor to both.

ASSET MANAGEMENT

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Meet the experts



Clare Vincent-Silk
Partner

In my 30 years of working in the financial sector, I have specialised in the areas operations, technology and regulation, helping firms to make effective change so they are more efficient and effective in the running of their businesses. I have experience of defining strategies, designing new operating models, selecting technology and service providers along with the delivery of change. I have had roles on both the buy and sell side, more recently focusing on **asset management**. I am the co-founder of **Sionic Signals** and I regularly speak at conferences and chair industry forums. As a thought-leader, I have also authored many **research reports** on different aspects of the asset management operating model.

ASSET MANAGEMENT

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Sionic Signals

Founded and led by the asset management team, Sionic Signals provides a Chatham House discussion forum for CTOs, CIOs, Heads of Technology, CDOs, COOs with technology responsibilities.

This annual subscription-based service that provides a network/community for "C" level technology focused managers in asset management to:

- discuss common industry challenges, new developments and emerging trends
- understand how peers are addressing challenges and areas they are focusing on
- get a "finger on the pulse" of current activity
- compare notes on system strategy
- make industry contacts and
- develop strategic thinking.

If you would like to find out more, please **contact us**.

Meet the experts



Jonathan Hammond
Partner

Meet Jonathan Hammond, Sionic Partner and asset management technology expert

I have over 23 years' experience in financial services and technology. I specialise in **asset management** operating models; application and **data** strategies; and enterprise architectures. I've worked with UK, European and global asset management firms, pensions businesses and a variety of investment companies helping them to determine their investment systems approach or to improve their operating models, especially through the use of **technology**. I consult on all types of systems including portfolio management, operations, middle office and administration platforms, as well as providing advice covering data management and data governance strategy and solutions.

ASSET MANAGEMENT

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Meet the experts

Dan Sharp
Director



I have worked in the investments industry for more than a decade, gaining a mix of practitioner and consulting experience, after qualifying as a Chartered Accountant in 2006. I specialise in operating model and outsourcing projects, and have worked on many projects covering the whole outsourcing lifecycle including developing sourcing strategy, supplier selection, deal negotiation, implementation and supplier management. I have worked with large and small traditional and alternative asset managers, and asset owners across Europe, the US and Asia. I enjoy solving problems for clients, simplifying the complex and seeing positive outcomes for clients as a result of the consulting work I perform.

ASSET MANAGEMENT

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Ashley Sheen
Director



I have spent the past 13 years focused on transforming financial services businesses. Having spent the early part of my career working for leading asset managers, I originally joined the firm in 2016. I have led a number of advisory and delivery engagements with asset managers and buy side service providers. My experiences to date have allowed me to develop a proven track record as a trusted advisor to senior stakeholders - supporting operating model strategy, constructing and evaluating business cases and leading complex delivery engagements.

ASSET MANAGEMENT

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Our global presence





Our offices include

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