

Implement the Right System to Meet Your Goals



"Dave and his team's in-depth experience enabled us to implement the right system and meet our goals."

*-Jayne Nelson, Director of Dealer Finance,
CI Investments*

CI Investments is a leading Canadian-owned diversified wealth management firm. As one of Canada's largest investment companies, it continually faces new challenges and finds that the adaption of processes and technologies that are intelligent, adaptive, cost effective and powerful greatly contribute to its success. In dealing with a system that required a large amount of support that was proving inefficient and no longer met its requirements, CI realized it wanted more control over its software and its abilities. Jayne Nelson, Director of Dealer Finance of CI, reached out to the Second Foundation team to provide CI with an integrated financial system.

"Our goal was to help Jayne and the team at CI to eliminate unnecessary paperwork and manual transactions, create timely management reporting, support a formal purchasing system and create an overall single integrated system with stable, flexible and scalable technology that allowed for easier maintenance and upgrades," states David Popowich, President of Second Foundation. "We recommended the Epicor Financial Suite of products."

"The Second Foundation team's in-depth experience enabled us to implement the right system and meet our goals," states Jayne, "In addition, the Second Foundation team wrote a customized module that tracked and supported the timely reporting of information that the senior management team required."

For any of your financial and operational management systems needs, and when you need to integrate complex financial systems, call Second Foundation.



www.second-foundation.com
(Email) sales@second-foundation.com

US Office:
(Phone) 814.454.5215
3250 West Lake Road, Suite 4
Erie, PA, United States 16505

Canadian Office:
(Phone) 866.565.3797
45 Washburn Dr, Unit A
Kitchener, ON, Canada N2R 1S1