



Deviat Consulting

Deviat Consulting focuses on back office accounting, operations and software consulting for single and multi-family offices. Our software expertise includes a wide range of investment and partnership accounting suites prominent in the UHNW wealth management space.

Why Deviate?

Our values are simple: *Trust, Integrity and Hard Work.*

We believe that our clients deserve our full attention during every step of their project. We take a thorough and honest approach to developing our project plans, workflows and policies and procedures, resulting in appropriate expectations for reaching important deadlines.

Service Offerings

Software Selection

- Build a systematic plan for evaluation
- Identify requirements unique to each firm
- Creation of an RFI specific to client needs
- In depth vendor qualification
- Contract negotiation
- Project plan formation

Software Implementation

- Assess project plan and define timeframes and expectations
- Lead point of contact for the implementation on behalf of the client
- System setup
- Reporting requirements and development
- Develop ongoing policies and procedures, including industry best practices
- Data reconciliation and validation
- Financial report validation
- Mirroring of dual systems
- Additional system training

A Trusted Partner

Accurate. Efficient. Effective.

Back Office Services

- Data aggregation
- Transaction entry and exception management
- Monthly reconciliation and reporting
- Cash management
- Capital call and distribution oversight
- Investor onboarding
- Investor statement delivery
- Regulatory compliance
- Document management
- Performance return validation