

# **SOURCES** A RESOURCE DIRECTORY

The 2023 Guide to Products and Services for the Securities Industry

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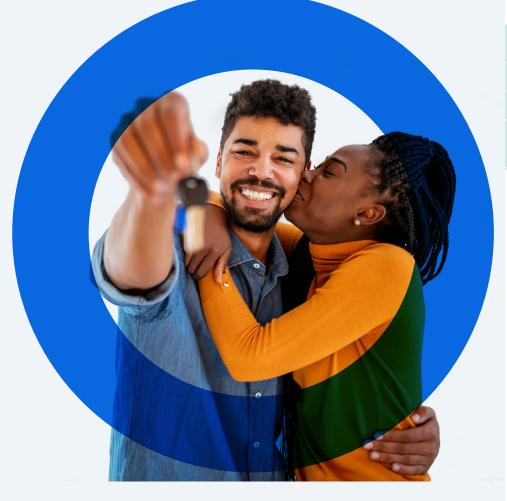
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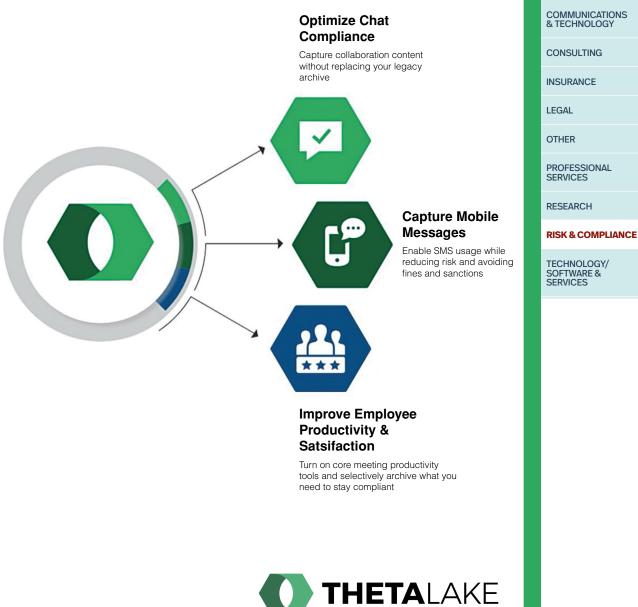
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617.286.4448 | <u>www.oncorps.ai</u> 116 Huntington Avenue, Boston, Massachusetts 02116 Tom Christensen, VP Marketing | <u>tom.christensen@oncorps.io</u>

At OnCorps, our mission is to elevate work and performance by applying Artificial Intelligence to automate predictable and laborious calculations, decisions, and tasks. OnCorps operations solutions have reduced labor costs by over 90 percent for our financial services clients, who collectively manage over \$11 trillion in assets.

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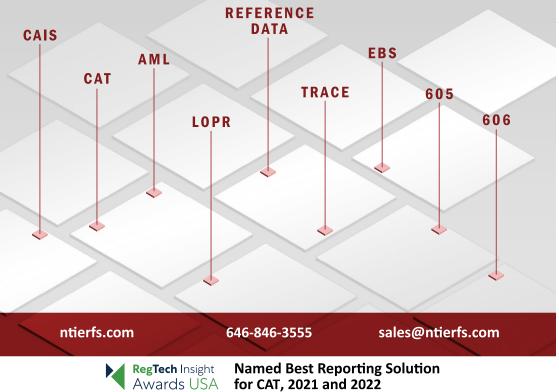
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Deb Symons, Head of Field Marketing | deb.symons@r3.com

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6500 River Place Blvd, Building 2, Suite 306, Austin, Texas 78730 512.329.3245 | <u>www.s3.com</u>

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S3 is a full-service compliance and trade analytics software company that serves many of the world's largest financial institutions and exchanges. S3's sleek, easy-to-use platform features trade analysis tools such as Global Best Ex & TCA for Options, Equities, and Fixed Income, as well as regulatory reporting tools for Trade Surveillance, SEC Rules 605 and 606 reporting, Consolidated Audit Trail (CAT) reporting, and MiFID II / MiFIR reporting.



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Skience delivers innovative cloud-enabled solutions that transform financial services businesses, helping save time and money while reducing errors at every stage of operations. Skience's award-winning platform and consulting services provide an efficient way to unify technology, increase back-office and advisor productivity, and set the stage for an exceptional client experience.

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## **¬ smarsh**

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TCS BaNCS solutions for securities and wealth bring unparalleled automation and control to the entire trade life cycle – from initiation and settlement to servicing. These solutions are the preferred choice of more than 300 leading custodians, asset managers and broker dealers worldwide, helping them accelerate business growth, modernize technology, and deliver unmatched user experiences.

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Torstone Technology is a leading global SaaS platform for post-trade securities and derivatives processing and risk management. We simplify the complexities of operational and risk workflows by connecting global financial industry expertise with technology innovation to provide comprehensive functionality, business process automation, and world-class client service to financial institutions across the globe.



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Mark Bubar, Managing Principal Global Financial Services | mark.bubar@verizon.com

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Vestmark is a leading provider of portfolio management/trading solutions and outsourced services for financial institutions and their advisors, enabling them to efficiently manage and trade customized client portfolios through an innovative SaaS platform. Supporting over \$1.5 trillion in assets and 5.5 million accounts, Vestmark is a trusted partner to some of the largest and most respected wealth management firms.



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strategic-marketing-team@yext.com

Search has never been more important. However, while the world of consumer search has innovated over time, enterprise search has not. Yext, the AI Search Company, offers a modern, AI-powered Answers Platform that understands natural language so that when people ask questions about a business, they get direct answers.

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### SPREAD FINANCIAL EDUCATION

The SIFMA Foundation advances financial education for youth of all backgrounds through its acclaimed programs - The Stock Market Game, Capitol Hill Challenge, Invest It Forward, and InvestWrite. The skills attained by participating in these programs prepare underserved youth for wealth-building opportunities and meaningful careers, carrying them from their earliest financial decisions through retirement. The extraordinary value of financial education empowers young people to thrive in society by reinforcing academics, life skills and socialemotional learning.

By supporting the nonprofit SIFMA Foundation, you can help bring financial education to under-resourced communities and begin to level the economic playing field. The Stock Market Game serves more than 600,000 youth each year, including 300,000 girls, 250,000 young people in underserved communities, and 200,000 youth of color.

### Make a difference in your community

**Expanding our Impact:** Review and forward our materials to an educator or administrator. Sign up with our recruitment form.

Sharing your Expertise with our Community: Volunteer as a guest speaker through **Invest It Forward Classroom** (in person or virtual) or as a judge reading and reviewing students investing essays as an InvestWrite Judge (virtual).

Investing in our Future: Connect with our Grants Team at foundation@sifma.org for partnership opportunities to support financial education in your region or **donate** to sponsor a student, teacher, or school.

Quick Links: Explore ways to make a difference.

**Quick Links** 



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