



NEWLINK

CONSULTING

Providing Expertise for Transformational Growth in the Asset Servicing Sector

Innovative Consultancy
Expertise for the
Financial Services
Industry in a Rapidly
Changing Marketplace



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CONSULTING

Expert Practitioners, Passionate Entrepreneurs

Based in London, the beating heart of the global Financial Services industry, New Link Consulting provides a comprehensive portfolio of consultancy services to a range of clients, including buy-side, sell-side and market intermediaries.

Welcome to the New Link in Financial Services Consulting

Providing Expertise for Transformational Growth in the Asset Servicing Sector

The Asset Servicing sector is undergoing significant change, driven by new regulation and technology. Clients using these services are looking to safeguard their assets, receive accurate and timely valuations and better mobilise their assets to meet their business needs.

In such a dynamic environment, Asset Servicing firms are exploring new models, such as Blockchain. They are also re-evaluating every part of their end-to-end processes, asking whether these areas still deliver value and provide the greatest efficiency while also focussing on winning business on client service rather than solely price.

At New Link Consulting, innovation is central to what we do and is strongly placed to help lead the Asset Servicing sector through its transformation. We focus on bespoke service delivery offerings through to developing industry-wide solutions. Our broad ranging service lines operate across seven core practice centres of excellence: Client Operations & Middle Office, Finance & Product Control, Market & Credit Risk, Operational Risk & Controls, Financial Crime, Payments Infrastructure and Data Management & Analytics.

Our Engagement Leads combine deep industry knowledge, gained through years of direct hands-on experience working within many different financial services organisations, with innovative and flexible change management skills. This blend of subject matter expertise and delivery agility enables us to tailor our services to meet the specific requirements of each client assignment. The outcome is a collaborative, team-based approach to problem solving and exceptional delivery standards, which help us to exceed the expectations of our clients.

Why choose New Link Consulting?

New Link Consulting is perfectly placed to be the partner of choice for the Financial Services Industry.

Our practitioners have had extensive experience gained in banks and other financial institutions; we know the industry inside out.

We are an entrepreneurial consultancy, with a flexible, solution led approach, which brings measurable results on time and within budget. With New Link Consulting as your partner, you will benefit from the collective experience and know-how of some of the financial services industry's brightest minds, working to find effective solutions to some of the most complex challenges facing your organisation today.

Consulting Services and Practice Centres of Excellence

New Link Consulting has five core consulting service lines which are delivered to clients across seven Practice Centres of Excellence. Our knowledge, tools and techniques are shared between and across our practices and client segments to ensure that we achieve consistency in the quality of delivery across all of our service lines. Consultants are aligned across practices, propositions and client segments based upon their industry experience.

Practice Centres of Excellence



Asset Servicing: Opportunities & Challenges

A recent report by McKinsey showed that of 50 FinTech firms surveyed, over half were providing products and solutions to custodians and asset services.

“Securities services incumbents should view FinTechs as partners rather than competitors. More than 70% of securities services-oriented FinTechs are developing products and services for incumbents, rather than targeting the industry’s end customers and striving to dis-intermediate incumbents.”

McKinsey

Opportunities

To move from an asset servicing business to a data service business

To win business on customer service and offering rather than price

Creation of an adaptable platform that can absorb increased volumes, new asset classes/products and regulatory change

To lead customers adoption of new technologies

Challenges

“Madoff” fallout - accurate valuations

Off-shoring Vs outsourcing

Legacy distributed system architecture

Regulatory change

Technology adoption - e.g. Blockchain and AI

Settlement and clearing model changes

Volume sensitivity (>AUC/AUA => Cost)

Fee compression and transparency

Data integrity and lineage

Corporate action processing

Reporting accuracy - client and regulator

Asset Servicing Focus Areas

New Link Consulting can combine its business practitioner lead consulting services with its asset servicing practice to drive tangible business benefits through the use of industry knowledge and expertise.

New Link Consulting's Asset Servicing Practice is driven by experienced practitioner led business consultants with the focus on the unique business domains of custody, fund administration, transfer agency and ancillary services. Core to Asset Servicing is consideration of the end client, whether an asset manager, a sovereign wealth fund or a HNW individual. New Link's offering is fully aligned to the primary objective of the asset servicing industry – delivering solutions that ultimately benefit the underlying client, whoever the client may be.

By combining our expertise in the subject matter with exceptional change management skills, New Link Consulting can assist clients to reduce their risk by placing responsibility for quality and managing timelines on us. We provide a collaborative partnership, where clients retain the ultimate control and decision making responsibility.



Data Strategy & Sourcing

Design and implement strategic Target Data Models (TDM) for custody and fund administration



Client Offering

Design client journeys, review products, service offering and fees and competitor analysis



Drive Efficiency

Review and redesign processes to increase scalability, align jurisdictions and future proof settlement and valuation models



Regulatory Readiness

Perform health checks against regulatory requirements and benchmarking



Technology Adoption

Provide advisory services regarding technology roadmap, selection and adoption methodology



Change Management

Develop sound change management processes to create customer centric change capabilities



Managed Service

Provision of processing capabilities across multiple areas including data, kyc/aml, process design and analysis



Regulatory Drivers

Adhere to regulatory commitments and timelines



Programme Governance

Provide industry expertise and resources to projects and initiatives

Contact

Established in 2011, our practitioner-led service offering combines deep industry knowledge, gained through years of direct experience working within City financial services organisations, with innovative change management skills.

Contact us now for further information.

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