MODEL CONSULTING SERVICES

SERVICES OFFERED

Financial models are the most critical decision-making tools in the world of finance; however, many financial models do not work in an optimal way.

At Marquee, we provide a range of consulting services to help clients improve their internal models, or to create new customized models, which allows for better and timelier decisions.

We create models and custom Excel solutions that are easy to use and update, and that can be seamlessly transferred to colleagues or clients. This results in tools that are sustainable for many years.

We are a team of professionals who have extensive modeling and consulting experience and we offer the following services:

- Building forecast models and custom Excel solutions
- Providing advice and/or implementation of model improvements and automation
- Reviewing models to ensure accuracy and integrity
- Consulting on valuation issues and mechanics

Our consulting clients have included:

✓ Banks	✓ Corporations	✓ Wealth management firms
✓ Insurance companies	✓ Asset management firms	✓ Academic institutions

OUR CONSULTING APPROACH

At Marquee, we believe that a good financial model needs to be a powerful communication tool that can be used to make effective decisions. Our consulting teams follow a detailed process to ensure the completed model is:

✓ **Dynamic**	✓ **Intuitive**	✓ **Transparent**
✓ **Flexible**	✓ **Printable**	✓ **Transferable**

Marquee's model consulting process begins where good financial models must begin - by understanding the business.
Our approach to consulting projects is highly iterative and can involve multiple steps, including:

Needs Identification – We assess any current models and understand the desired uses and needs of the new model

Due Diligence – We determine the optimal inputs and required outputs, and understand how the model will be used

Model Design – We design the optimal structure for the model, including user-friendly input modules, automated supporting schedules, customized output modules, powerful sensitivity functionality and model security/protection features

Model Development – We develop a comprehensive model based on the above steps, while interacting closely with our client throughout the process

Model Testing – We test the model to ensure there are no bugs and that the model works as expected in all scenarios

Documentation & Training – We create manuals and offer team training to ensure that the model users and their managers have the information, reference materials and best practices to ensure long-term use and maintenance of the new models

Ongoing Support – We provide ongoing support for any questions and/or model refinements