

**OneDesk™**

*Your desk. Our desk. OneDesk.*

# Contents

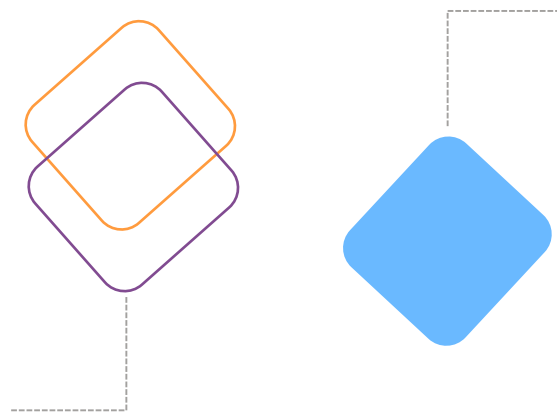
<b>Market Gap</b>	<b>2</b>
<b>OneDesk™</b>	
<i>Solution</i>	<b>3</b>
<i>Features</i>	<b>4</b>
<i>Benefits</i>	<b>5</b>
<b>Why OneDesk?</b>	<b>6</b>
<b>Business Use Cases</b>	<b>7</b>
<b>Get Started</b>	<b>8</b>

# Market Gap

## The Gap

As the need for highly specialized compliance advisory services has increased, so has the retention of consultants. Yet the fixed retainer engagement model remains unchanged.

Accordo is filling a gap in the market with a flexible engagement model for providing professional advisory services on a **pay-as-you-go** basis.



## Solution

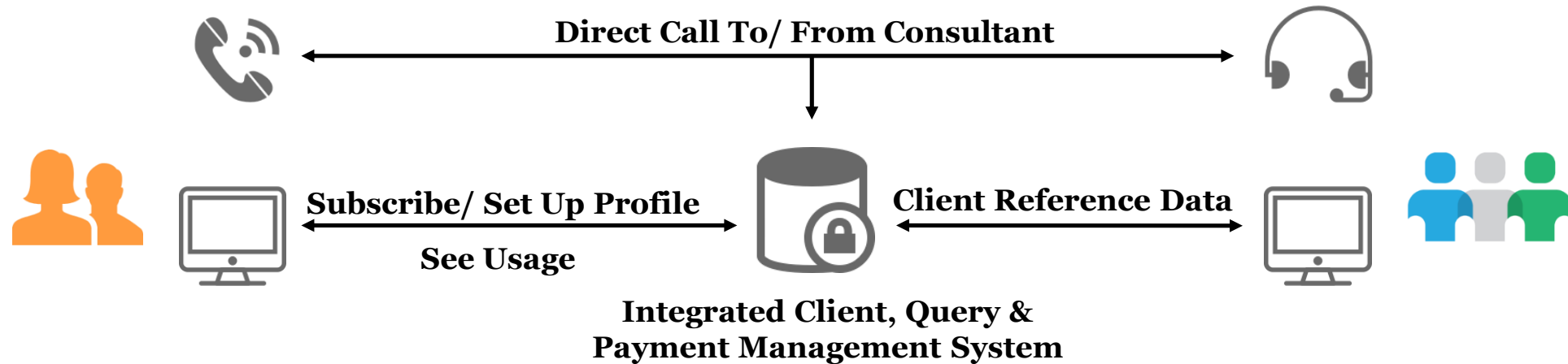
OneDesk™ is a market-leading professional services helpdesk for financial services compliance-related queries.

Its dynamic model eliminates the traditional barriers to retaining a consultancy. OneDesk provides an intuitive way for firms to access compliance and regulatory **expertise on-demand**.

**Accordo** is a strategy and risk advisory to financial services firms, emphasizing **value-added offerings**. With a thorough understanding of today's complex compliance regulatory requirements and emerging technology trends, Accordo delivers intuitive, issue-specific solutions.

# OneDesk™ Solution

Through OneDesk, firms gain immediate access to compliance professionals with extensive institutional and regulatory expertise. OneDesk's intuitive design makes highly skilled resources available on-demand.



# OneDesk™ Features



## Single point of contact

Instant call-access to any member of advisory team



## On-Demand

Real-time guidance from Accordo's Best-In-Class consultants



## Multi-Level View

Track calls and view consultants profiles



## Ease Of Use

Access web portal on an easy to use interface

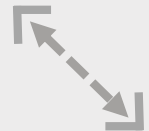
Accordo's staff addresses queries received by phone. Consultants then gather information & conduct research to provide **detailed, actionable guidance.**

# OneDesk™ Benefits



Peer-to-peer knowledge sharing of industry best practices

Enhanced agility, faster time to market



Flexible and efficient vs. static and latent

Validation of approach for compliance officers & executives



Manage complex and evolving regulations

Real-time seamless & collaborative support

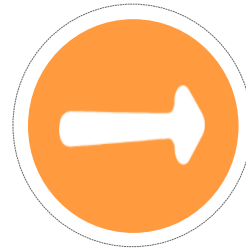


# Why OneDesk™ ?

The traditional consulting engagement model is not always a fit.

## Limited Scale

Static, ready-made model  
unable to fit new and growing  
needs



## Fixed Fees

Retainer fee for ongoing  
compliance services



## Service Disparity

Diverging need and service  
creates program gaps



## Statement of Work

Process of defining and  
approving a scope of work



# OneDesk™ Business Use Cases

## REAL-TIME GUIDANCE

Broker-dealer receiving more questions than usual from FINRA asks Accordo if they should have any concerns, and if so what are next steps.

## COACHING & TRAINING

Firm elects talented, capable individual to CCO role, supported by Accordo where she has had little to no “in-the-seat” exposure to specific rules impacting the firm.

## EVOLVING REGULATIONS

Firm looking to transact in blockchain based assets consults with Accordo on regulatory approvals (FINRA/ NFA/ NYDFS) and requirements.

## BEST PRACTICES

Investment manager looking to implement portfolio or robo-advisory models consults with Accordo on compliance and regulatory considerations for this new area of business.

## VALIDATE APPROACH

CCO identifies anomalies requiring further internal investigation, seeks guidance from Accordo on situational assessment, documentation, and reporting.



# Get Started with OneDesk™



8

*Connect with Accordo*



To engage us through OneDesk, click below

[Click here](#)

For more information, please visit  
**[accordo.solutions/onedesk](https://accordo.solutions/onedesk)**

Accordo makes OneDesk available for use by companies in all industries. If you are interested in adopting OneDesk for your business, please contact [onedesk3p@accordo-cs.com](mailto:onedesk3p@accordo-cs.com) or 646-868-8150.

Questions?

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