

BRILLIANT®

A Business Solutions Case Study

SEE HOW WE HELPED **A WEALTH MANAGEMENT COMPANY**

Who

A global, financial services company that provides wealth management services for individuals and families.

Need

Our client needed extra resources within the SOX team for several months to assist with a large volume of SOX testing needed to be completed.

Solution

Brilliant Management Resources was able to provide a full, solutions-based plan. A team of four SOX resources—consisting of one manager to act as the liaison between Brilliant and the client and three SOX testers reporting into said manager—was successfully deployed to assist with the SOX work.

Outcome

As a result, the 10K was filed timely with a complete internal controls certification and the client was immensely satisfied.

“Our client was extremely satisfied with our customized business solution created for their SOX needs. We made sure we lifted any effort off them so they could focus on what they do best while we took over managing the program. We are pleased that our team was able to successfully fulfill the SOX testing requirements and remain compliant all under the deadline—and we know our client was happy, too.”

—Jennifer

Senior Client Solutions Manager
Brilliant Management Resources

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