FinOps Partners

FIRM BRIEF & FAQ
OCTOBER 2026

Operators for wealth management growth. We connect M&A, platform and AI into one plan and deliver it.

FinOps Partners embeds **senior finance operators and experienced technology partners** inside RIAs, multifamily offices and PE-backed wealth platforms. We come in when finance and operations teams need to keep pace with acquisitions and growth, and we stay until the work is stable.

WHAT WE DO

M&A Integration

Pre-close readiness through post-acquisition finance and operations stabilization: billing and client transitions, revenue, close and controls.

Product: M&A Diagnostic, with Ionixx
finopspartners.io/ma-diagnostic

Platform Buildout

Enterprise finance and operations platform design and build: data foundations, systems integration and workflows that scale with the firm.

Delivered with: Avantos, Devōt, Ionixx and Outerland

AI Deployment

AI readiness assessment, use-case selection, and deployment of governed agentic workflows across finance and operations.

Product: AI Deployment, with Boagent
finopspartners.io/ai-deployment

HOW AN ENGAGEMENT RUNS

STEP 1
1-day diagnostic
Actionable written output, yours to keep.

STEP 2
Week-long assessment
Scope, priorities and a costed plan.

STEP 3
One-month sprint
First build or fix, delivered.

STEP 4
3-month embedded
Partner-led delivery inside your team.

Each step scales only as far as the results of the previous one justify.

WHO LEADS THE WORK

KM **Kreso Marusic** FOUNDER + MANAGING PARTNER
Former CAO, Corient Private Wealth; Bridgewater, Deutsche Bank, PwC. NY CPA, NYU MBA.

RG **Russell Glorioso** OPERATING PARTNER
Former VP Strategy & Operations, Corient; Engagement Manager, McKinsey. Duke MBA.

BG **Brandon Goldney** OPERATING PARTNER
10+ years in software engineering, investment management and leveraged finance. CFA.

JT **Jamel Talbi** OPERATING PARTNER
20+ years in data transformation; built Billigence's financial services practice; Deutsche Bank. CFA.

Why firms choose us. Point solutions, large consultancies and fractional executives each cover one angle. We work in the middle: one accountable team that connects finance, operations and technology. Our people have run these engagements inside **wealth managers, banks, hedge funds and broker-dealers**.

FinOps Partners

What firms ask us before they sign.

FREQUENTLY ASKED QUESTIONS

Who do you work with?

Wealth management firms only: RIAs, multifamily offices and PE-backed wealth platforms that are acquiring, scaling or modernizing their operations.

Who will work on our engagement?

A named FinOps partner leads every engagement and is accountable for delivery. Specialist partner firms add engineering and product capacity under our management.

Who are your delivery partners?

FinOps Partners is your single contracting party. Our partner firms work under multi-year agreements with us.

Products Avantos, Boagent, see6

Services Ionixx, Devōt, Outerland

Will you recommend a product because you resell it?

We disclose our commercial relationship with any product we propose. Your requirements drive the choice, and we will scope a build or a third-party alternative when it fits better.

Who owns the firm?

FinOps Partners LLC is a Delaware company, owned by its partners. The founder holds majority control. We have no outside investors at this time, so no sponsor's portfolio interests can conflict with yours.

What is your track record?

Our partners have completed multiple wealth and asset management engagements, including building finance functions and platforms and integrating RIA acquisitions at Corient Private Wealth. Earlier roles include Bridgewater, Deutsche Bank, McKinsey and PwC.

- Two productized offerings with partners: the M&A Diagnostic with Ionixx, and AI Deployment with Boagent
- As of October 1, 2026, in proof-of-concept and pilot stages with four companies

Case studies are available on request.

How do you use AI?

We use Claude for Teams, hosted by Anthropic, and client work is done under our Claude Team licenses. The workflows we build for you, including prompts, configurations and agent harnesses, are transferable and can run in your own cloud environment.

How do you handle our data?

We use only the data the work needs, and your data stays in your systems.

- All work communication runs through FinOps Partners email accounts
- Our AI work runs on Claude under Anthropic's commercial terms, so Anthropic does not train its models on your data
- Partner firms work under the same confidentiality obligations; the two with offshore delivery follow your requirements and our policies
- We notify you of any incident affecting your data within 72 hours, in line with Regulation S-P

Have you published your methods?

Yes. Our papers on data ontology and platform architecture are available at finopspartners.io.

What insurance do you carry?

Professional liability (E&O), cyber and general liability. A certificate of insurance can be provided before signing.

Whose contract do we sign?

Our standard MSA and SOW, or your firm's MSA, which we review with counsel. A mutual NDA is in place before the diagnostic, and confidentiality terms flow down to every partner firm on the engagement.

What can we review during diligence?

Under mutual NDA, on request:

- Certificate of good standing and ownership summary
- Certificates of insurance
- Partner CVs and case studies
- Sample diagnostic output
- Standard MSA and SOW
- References

Start with a 1-day diagnostic.

Actionable written output, yours to keep.

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