

Advisory Services

From Diagnosis to Architecture: Two engagement models for investment firms transforming their operational infrastructure.

PLATFORM DIAGNOSTIC	FRACTIONAL OPERATIONAL ARCHITECT
Tier I · 2–4 Weeks	Tier II · 3–6 Month Retainer
Structured assessment of your operational platform scored across 10 pillars of institutional maturity. Stakeholder interviews, workflow mapping, shadow system identification, and a prioritized remediation roadmap with an executive-ready presentation.	Embedded, part-time operational leadership to design and execute your platform transformation. Typically structured as a 90-day engagement across three phases: Foundations, Intelligence, and Resilience. Weekly syncs and monthly Board-ready updates.
Deliverables • Scored Assessment Report • Prioritized Remediation Roadmap • Board / IC Presentation	Deliverables • Phased Transformation Roadmap • Vendor & Integration Architecture • Monthly Board-Ready Updates • AI Readiness Assessment

Who This Is For

These engagements are designed for investment firms at an inflection point — where operational infrastructure is the ceiling on growth.

- Alternative asset managers scaling fund complexity
- Private wealth firms and family offices outgrowing their systems
- Traditional managers absorbing AUM growth and regulatory change
- COOs building the internal case for platform transformation

Start With a Conversation

Every engagement begins with a 30-minute discovery call — no pitch, no pressure. We assess fit, discuss your firm’s specific challenges, and determine the right starting point.

eric@armatureadvisory.com · Responses within 24 hours · All conversations are confidential

Background

20+ years at the intersection of Risk, Technology, and Operations across hedge funds, private wealth, family offices, and private markets. Leadership roles at **Rockefeller Capital Management**, **Fiera Capital**, and **xAI**. Author of *The Institutional Architect* newsletter and *The COO’s Perspective* series on LinkedIn.