



Renaissance Regulatory Services

COMPLIANCE
through **RELIANCE**



Who We Are

Renaissance Regulatory Services (*RRS*) is a privately owned boutique consulting firm based in Deerfield Beach, Florida. Our senior managers, consultants, and partners consist of former regulators and compliance professionals who have extensive SEC, FINRA, and state regulatory experience. Our team members hold industry focused certifications including: Certified Regulatory Compliance Professional, the Certified Regulatory Compliance Specialist, the Certified Anti-Money Laundering Specialist, and the Certified Financial Advisor. Our team is recognized throughout the industry as dedicated compliance professionals who provide prompt and professional support to our clients. The staff of *RRS* are active participants with industry trade groups and speak frequently at industry events focused on regulatory compliance.

What We Do

Renaissance Regulatory Services supports our clients by providing comprehensive regulatory, compliance, and operational consulting to investment advisers, private funds, investment companies, broker-dealers, and banks. We specialize in SEC, FINRA and State compliance examinations, written supervisory procedures, internal controls testing, regulatory reporting, and registration services. Our services are customized to fit each firm's unique operations and can be performed onsite or remotely. *RRS* strives to be the primary provider of regulatory, compliance, and support solutions for your firm. Our goal is to provide unsurpassed technical support and outstanding service that will increase the efficiency and effectiveness of your firm's compliance program and reduce costs.

Our Solutions

RRS is founded on the premise that the financial services industry is constantly changing. New products and services, changing regulations, and globalization create unique issues in compliance and operations for firms of all sizes and business models. In order to *Manage Through Change*, firms must have the ability to quickly recognize and respond to the regulatory compliance and operational challenges that arise. *RRS* supports firms with these challenges by providing comprehensive consulting and compliance support solutions in a customized format.

Practical Guidance

- Cost effective solutions for firms
- Consultants who respond to regulatory, compliance, & business requirements

Technical Expertise

- Consultants with extensive regulatory examination and consulting experience
- Testing practices that include risk based, forensic, and statistical sampling methodologies

Customized Solutions

- Multiple levels of service designed to meet or exceed regulatory and firm requirements
- Support solutions that allow firms to concentrate on core competencies

Consistent Support

- A team of consultants who fill technical gaps when regulatory or business changes occur
- Services delivered onsite or remotely by a dedicated team



SERVICES



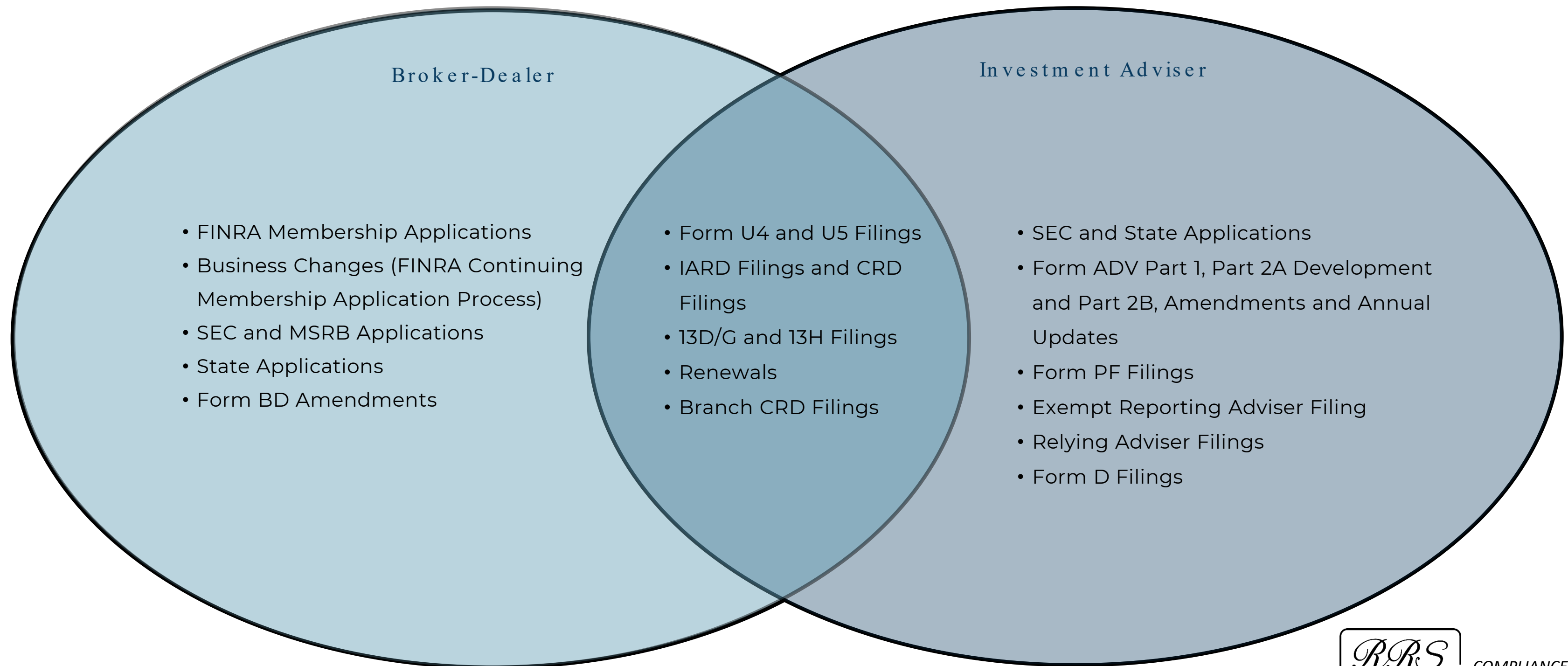
Services

Whether you manage an established firm, are considering a startup, or serve as outside counsel, *RRS* offers a wide range of services designed to meet virtually every compliance and operational need. From initial startup, through ongoing operations, to expansion and mergers, *RRS* can provide the insight and expertise to help you keep up with rapid changes in business models and the industry.

- Business Planning, Startup, Registration & Licensing
- Compliance Programs, Written Supervisory & Internal Controls Policies and Procedures
- Compliance Administrator Program
- Financial Operations Bookkeeping and Support
- Compliance Examinations
- Litigation Support – Independent Consulting

Business Planning, Startup, Registration & Licensing

RRS has an in-depth understanding of the regulatory requirements for starting an investment adviser, broker-dealer, or dual registrant. Our team has extensive registration experience from developing SEC and state registration disclosures for investment advisers to supporting the FINRA New Member or Continuing Membership Application processes for broker-dealers. We offer a customized, "hands on" approach that does not rely on registration software or generic compliance procedures.



Investment Adviser Compliance Programs, Written Supervisory & Internal Controls Procedures

Whether an Investment Advisor is registered with the SEC or State, firms must develop and maintain a compliance and supervisory program. *RRS'* team can support Chief Compliance Officers with their compliance programs.

- Portfolio Management

- Trading and Trade Allocations (Best Execution Obligations and Soft Dollar Arrangements)

- Proprietary and Personal Trading and Activities (Code of Ethics)

- Political Activities ("Pay-to-Play" Rule)

- Disclosure Review

- Safety of Clients' Assets and Privacy

- Information Processing and Protection

- Marketing Including Use of Promoters and/or Placement Agents

- Portfolio Valuations

- Business Continuity Plans

- Compliance Program Risk Management

- Private Fund Compliance

NMA/CMA Project Timeline

The time to complete the NMA/CMA process varies widely based on the complexity of the business lines, the time necessary to compile the documents and information for the application, internal timelines, and the FINRA review process. The following is *RRS'* projection of the timeframe to go through the application process, FINRA review process and response to follow up requests. We strive to minimize the follow-up questions by preparing a comprehensive initial filing package.

Preparation of NMA/CMA Package (Estimated 6 – 8 weeks preparation)

- Initial Kickoff Meetings
- Documentation Retrieval and Creation
- Final Review and Approvals

Meeting with FINRA Senior Staff (TBD)

FINRA Review Process: 120 – 180 days

- Review and Response Times: 30/60/30...

NMA/CMA Project Timeline

Based on the preliminary assessment, *RRS* tailors the initial notice to FINRA to ensure maximum efficiency.

- **Business Plan** – New business description, organizational structure, supervisory structure, pro-forma financials, marketing, and clientele.

- **Policies and Procedures** – Create or update existing written compliance and supervisory procedures to address the new business.

- **Form BD** - Prepare and file updated Form BD and related schedules.

- **Follow-Up with FINRA** – Coordinate responses to additional inquiries

- **NMA/CMA Interview** – Prepare responsible parties for the interview with FINRA staff as required.

- **Registrations** – Assist with any state, agent or mass transfer issues related to the new business.

Broker-Dealer Compliance Programs, Written Supervisory & Internal Controls Procedures

Establishing and implementing a compliance program can be a daunting task for any size organization. Our clients leverage *RRS'* depth and breadth of expertise to customize compliance programs with written policies and procedures that fit their unique business model.

- Compliance Department Structure

- Surveillance Systems

- Supervisory Procedures

- Internal Controls Procedures

- OSJ and Branch Office Manuals

- Compliance Policy Manuals

- Trading and Market Making Procedures

- Bank Networking Arrangements

- AML Program Development and Testing

- Business Continuity Planning

- Special Product Supervision

- Financial Controls and Operations Manuals

- Municipal Securities Activities Supervision

- Risk Management Procedures

- Foreign Affiliates and Representative Supervision

Registration

RRS covers all the loose ends, including state filings, Representative licensing and basic books and records.

- Representative Registration
- State Notifications – Notify state jurisdictions of business and supervisory changes, as applicable
- Form Filings – Assist with any Agent or Mass Transfer request issues
- Books & Records - Identify the books and records that will be required to prepare and maintain with regard to the anticipated business activities

Compliance Administrator Program & Ongoing Compliance Support

Whether a firm is undergoing a merger, rapid growth, or a reorganization, *RRS'* staff can provide temporary or long-term support for virtually any compliance need. Any of our services can be selected and delivered on site or remotely to suit the particular circumstances.

- Customized Levels of Service & Retainer Plans

- Dedicated Consultant Assigned to Your Firm

- Monthly Regulatory Update & Conference Calls

- Compliance Calendar Development

- Registration & Licensing

- Regulatory Reporting

- Rule Interpretations

- Risk Assessments

- Policy and Procedure Updates & Implementation

- Advertising Reviews

- Periodic Onsite Examinations

- Continuing Education & Training

- Financial Reporting

- Electronic Communications Analysis and Support

Compliance Examinations

Broker-Dealers and Investment Advisers are under increasing pressure to conduct comprehensive reviews and testing of their operations, policies, procedures, and internal controls structure. *RRS* tailors its examinations program to fit our clients' needs by providing multiple levels of service that meet or exceed regulatory requirements for periodic reviews.

- Broker-Dealer & Investment Adviser Regulatory Compliance Examinations

- Supervisory & Internal Controls Testing

- Branch Office Examinations

- Trading and Market Making Surveillance Exams

- AML Program Testing

- Code of Ethics Reviews

- Support for Compliance Investigations

- Written Supervisory Procedure Assessment

- Risk Assessments & Gap Analysis

- Regulatory Examination Support

- Independent Compliance Consultant for Regulatory Mandates

- Specialized Sales Practice Reviews

AML Program Testing

RRS' staff is qualified to conduct the independent testing of Anti-Money Laundering Programs for compliance with the requirements of FINRA Conduct Rule 3310, Bank Secrecy Act, and OFAC. Consulting engagements include preliminary review of the written AML Program and transaction records, interviews with appropriate personnel and on-site examination & testing of the firm's books and records.

- Policies and Procedures
- Internal Controls
- Customer Identification Procedures
- Recordkeeping & Reporting Practices
- Management Acceptance
- OFAC Monitoring
- Training Requirements
- Ability to Detect Suspicious Activity
- CTR/SAR Surveillance, Escalation & Filing Procedures
- Information Sharing with Law Enforcement & Other Financial Institutions

Litigation; Expert Witness, Independent Consultant

Our comprehensive suite of litigation support and expert witness services are designed to assist securities lawyers with regulatory, enforcement, and litigation matters involving their broker-dealer and investment adviser clients. Our Consultants have extensive industry expertise and experience as senior level officials with regulatory organizations. Our experience includes complete analysis expert reports, testimony in arbitration and civil proceedings.

- Conduct Preliminary Interviews with Counsel and Senior Management
- Review relevant case documents & supporting evidence
- Conduct preventive on-site examinations to preempt potential regulatory disciplinary action
- Review Relevant Current Written Policies & Procedures
- Review/critique opposing expert written report if provided
- Attend Arbitration or civil litigation hearings and provide expert testimony
- Provide Written Expert Report if required by Counsel

The RRS Process

RRS works closely with our client's senior management and compliance staff to assess the firm's needs, develop recommendations, and prepare a project plan to implement the recommendations. *RRS* will also provide implementation support as necessary to complete the process.

- Conduct Preliminary Interviews with Senior Management
- Interview Key Supervisory, Operations, & Compliance Staff
- Review Internal & External Organizational Structure
- Review Current Written Policies & Procedures
- Identify Systemic Controls
- Review Applicable Operational Work Processes
- Perform Testing of Current Supervisory Processes
- Provide Written Report of Recommendations and Project or Action Plan
- Provide Ongoing Implementation and Training for Appropriate Staff

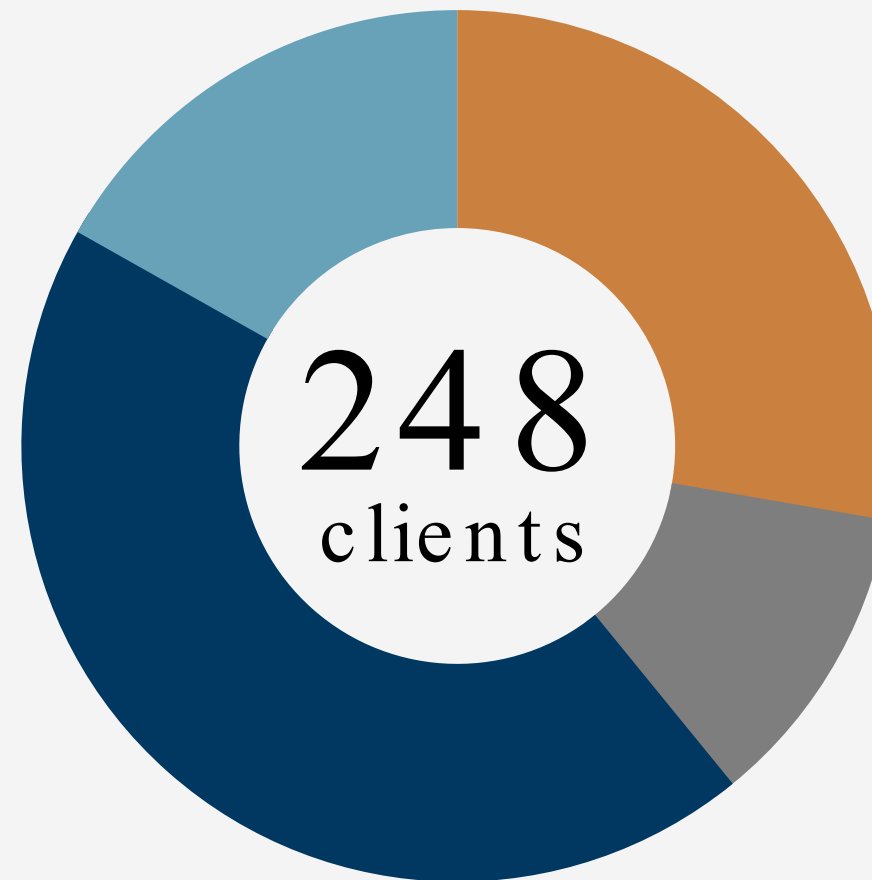


CLIENT DEMOGRAPHICS



Client Types

- 106 IA - SEC
- 43 IA - State
- 6 IA - SEC - ERA
- 56 Broker-Dealers
- 12 BD - IA - SEC
- 5 BD - IA - State
- 3 Hedge Funds
- 2 Banks



- 2 Consultants
- 2 Law Firms
- 2 IC
- 1 Industry Association
- 1 Insurance
- 1 CPA

Investment Advisors

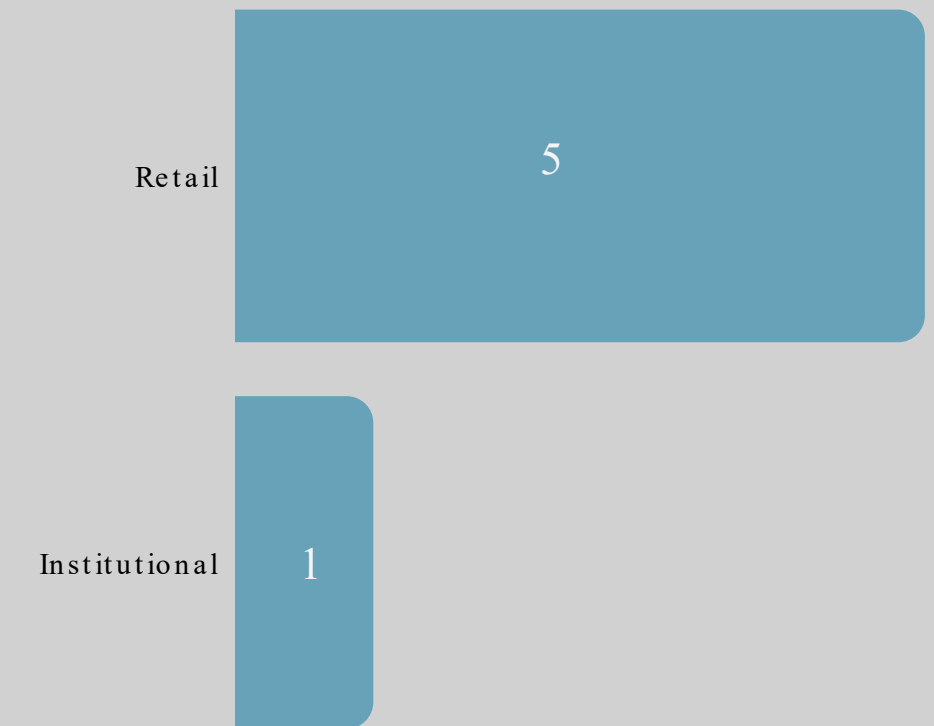
102
IA - SEC



43
IA-State

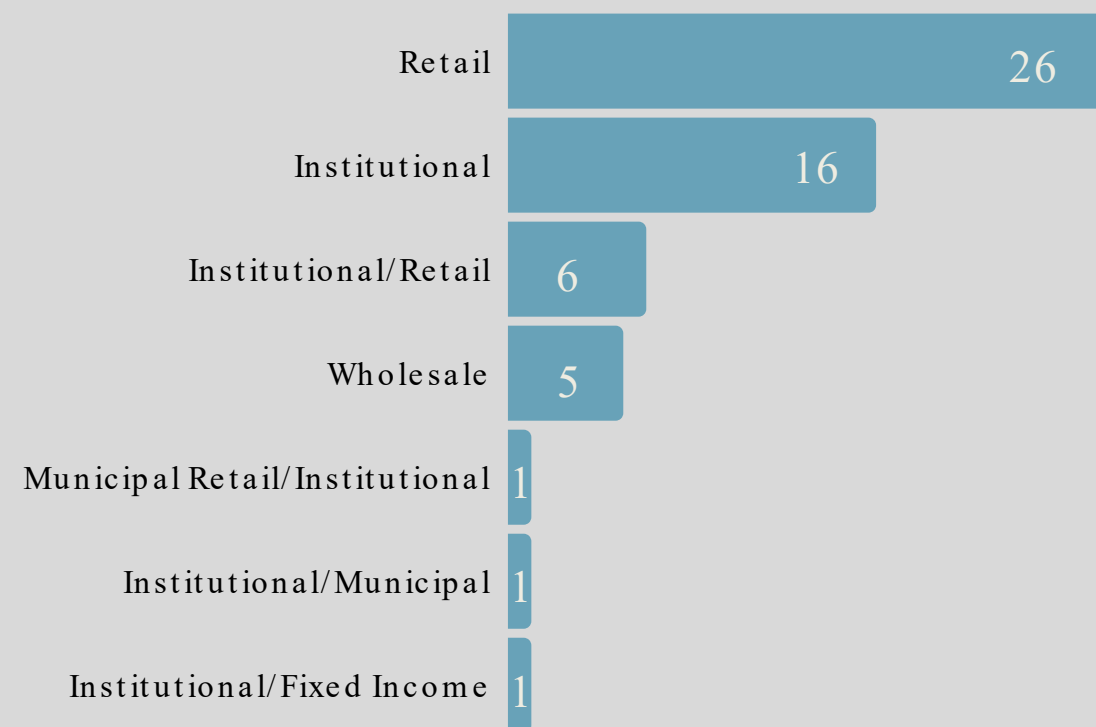


6
IA-SEC-ERA

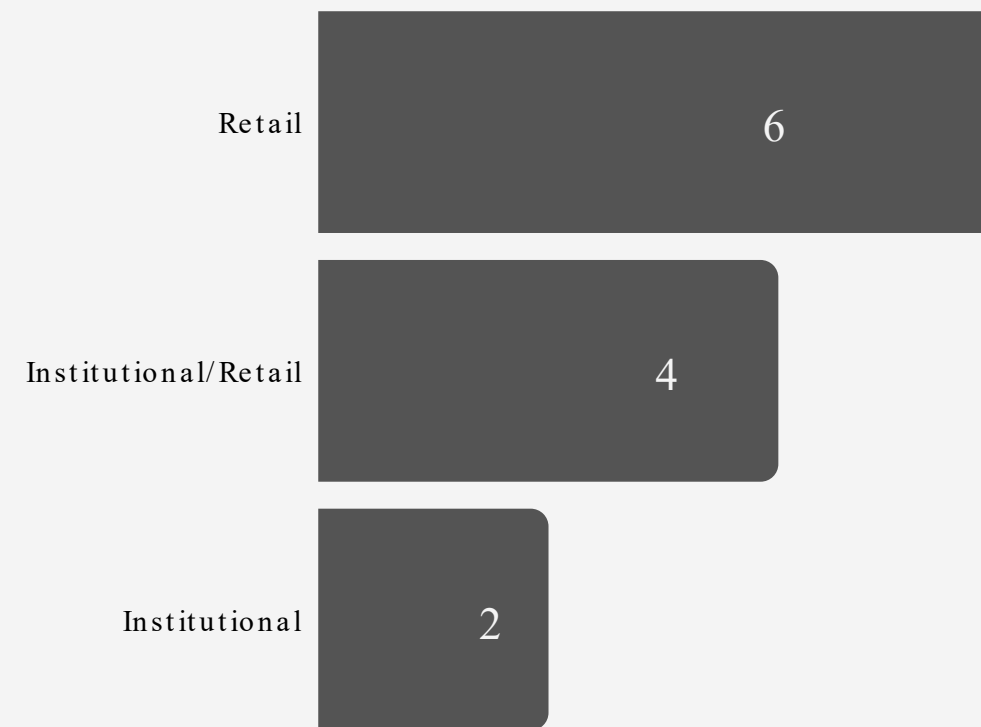


Broker-Dealers

56
Broker-Dealers



12
BD-IA-SEC



5
BD-IA-State



Others

3

Hedge Funds

Retail

2

Association

1

2

Banks

Retail

1

Institutional

1

2

Consultants

Law Firm

1

Institutional

1

Others

4

Law firms

2

IC

1

Industry Association

Law Firm

4

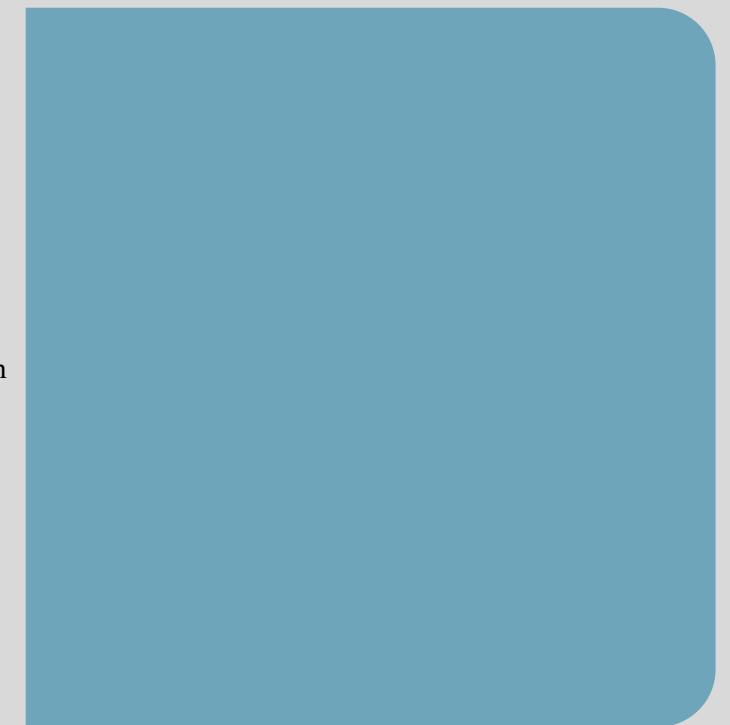
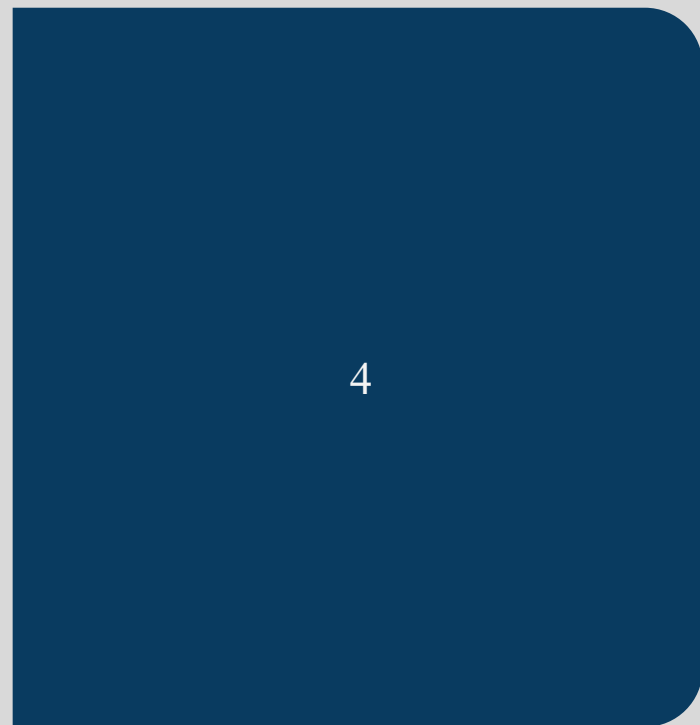
Institutional

1

Institutional/Retail

1

Association



Others

1

Insurance

Retail



1

CPA

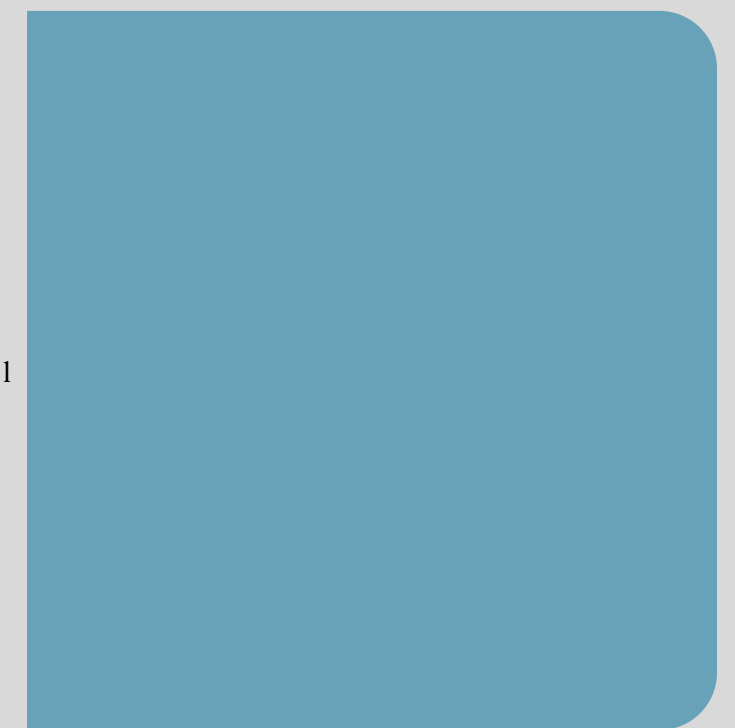
CPA



1

Government

Institutional



Others

1

Regulator



Regulator

United States



Where are our clients from?

Number of clients

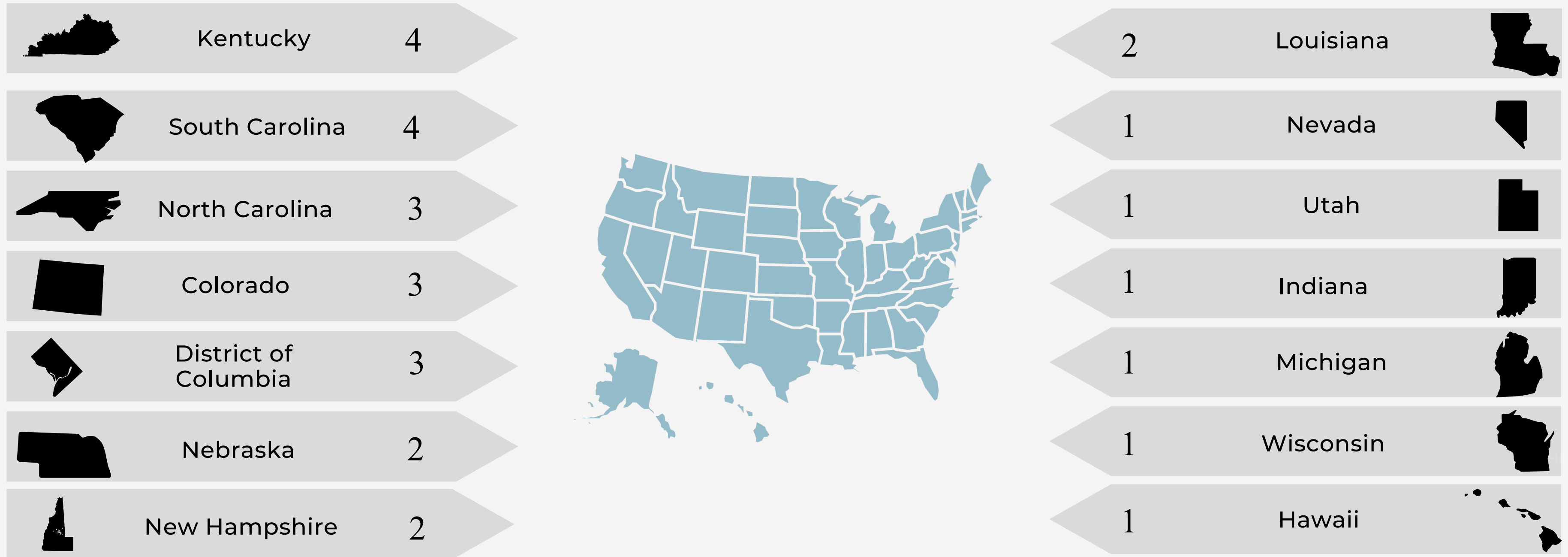


United States



Where are our clients from?

Number of clients



International clients

Where are our clients from?



Canada



Ottawa, ON

Switzerland



St. Gallen

Hong Kong



Hong Kong



Puerto Rico

Guaynabo



San Juan



England

London



Grand Cayman

Grand Cayman





THE TEAM



Our Team



Louis Dempsey
Founder/President

- 30+ years of public/private sector regulatory, compliance and operations experience.
- Advises broker-dealers, investment advisers, and bank holding companies relative to federal, state, and self-regulatory organization rules and regulations.
- Extensive regulatory experience including SEC, SRO oversight, and State securities regulation.
- Previously served as a Branch Chief, with the Securities and Exchange Commission and a Financial Specialist with the State of Florida Division of Securities and Investor Protection.



Bart McDonald
Executive Vice President

- 25+ years of public/private sector regulatory compliance and operations experience.
- Advises investment advisers, broker-dealers, private funds, investment companies and bank holding companies relative to federal, state, and self-regulatory rules and regulations.
- Served as a Branch Chief with the Securities and Exchange Commission's Southeast Regional Office.
- Has extensive experience with all aspects of securities regulation, including portfolio management, performance marketing, soft dollars, trading, sales practices, branch office supervision, financial audits, internal controls, and registrations.



John Ryan Greenbaum
IT Administrator

- Configures, audits, and maintains the technology systems and networking infrastructure.
- Responsibilities include SharePoint development, network security and risk management, cloud migration, business automation, and computer configuration and troubleshooting.
- Currently studying for the Microsoft 365 associate exams in preparation for earning the Microsoft 365 Certified: Enterprise Administrator Expert certification.



Jerome Jordan
Director, Regulatory Compliance
Services

- 35+ years of public/private sector regulatory compliance experience.
- Served for 24 years as the Area Financial Manager of the Florida Office of Financial Regulation, Division of Securities' Miami Regional Office and concurrently as the interim Manager of the West Palm Beach Regional Office in 2012, 2014 and 2015.
- Provided training to the regulatory compliance staffs from the Republic of the Philippines and the Commonwealth of Puerto Rico, as well as to international banking regulators.
- Extensive experience in developing onsite examination modules and tools to assess compliance with State, SEC and FINRA requirements.



Ken Mendoza
Registrations Associate

- 25+ years of experience. Responsible for creating, amending and submitting Form U4s, Form U5s, Form ADV Parts 1A and 1B, Form BD, and the creation and use of CRD/IARD reports. Also responsible for handling broker-dealer and investment adviser (firm and agent) renewals, EFD filings, Form MAs and Form MA-Is.
- Responsible for preparing the Form BD, Form ADV Part 2, Part 2B and Appendix 1 (as applicable) for a firm to register as a broker-dealer, SEC or State registered investment adviser. He is also responsible for drafting applicable application packages and deficiency letter responses.
- Expected to assist with certain technology or website related tasks or maintenance.



Lisa Paygane
Director, Registration Services

- Over 30 years of experience in the financial services industry and has supported a wide range of broker-dealer and investment adviser registration engagements.
- Manages all aspects of the registrations department, including consulting services, for FINRA and NYSE broker-dealers regarding new and continuing membership applications.
- Has served in project management positions on registration related matters for large national and multinational firms. These engagements have included project management for FINRA and SEC Filings for alternative trading systems, self-clearing broker-dealers, full-service broker-dealers and limited purpose broker-dealers.



John Pinto
Managing Director

- 40+ years regulatory and compliance experience.
- Provides expert witness and regulatory consulting services to broker-dealers.
- Served as the top-level executive in charge of examination and enforcement functions at the National Association of Securities Dealers (NASD) where he was responsible for more than half of approximately 1,800 NASD employees.
- Has received numerous awards and honors including Securities Industry Association's Compliance and Legal Division award for "Meritorious and Distinguished Services to the Securities Industry," and the Federal Bureau of Investigation's award for "Exceptional Service in the Public Interest."



Sarahy Poncela
Compliance Consultant

- Held compliance roles with SEC-Registered Investment Adviser firm, and large banking institutions.
- Experience developing a Compliance program tailored to the firm's business and risks, creating policies and procedures, conducting compliance testing reviews, gap analysis and risk assessments, and providing ongoing Compliance training to firm employees.
- Over 5 years of experience in AML compliance. Her responsibilities included creating AML policies and procedures, performing Enhanced Due Diligence searches to meet all regulatory requirements, conducting branch operational tasks, monitor and address high risk transactional activity and mitigate red flags.



Md Mostafa Asef Rafi
Financial Reporting Manager

- Responsible for managing Net Capital related matters for large and small firms alike. Managing FOCUS filings for broker dealers and the creation and submission of SEC Financial audit reports.
- Has been involved in projects related to AML and Compliance check for both Investment Advisers and Broker Dealers. Moreover, he supports the Financial Reporting Manager with FinCen support for small firms.
- Supports the Financial Reporting team with bookkeeping services for FINRA broker-dealer regarding SEA rule 15c3-3 Net Capital requirement and FOCUS filings. He also supports the Financial Reporting Manager with 13F and 13H quarterly filings needed by Institutional Investment Managers.



Catalina Rivera
Marketing Manager

- Responsible for planning, creating, and executing marketing campaigns across various channels including digital, print, email, and social media.
- Develops and creates marketing content such as social media updates, videos, newsletters, and the creation and distribution of marketing materials such as brochures, flyers, banners, and presentations.
- Is Google Ads Display certified, a professional accreditation that Google offers to individuals who demonstrate proficiency in basic and advanced aspects of Google Ads.



Jennifer Selliers
Director, Senior Consultant

- 20+ years of experience building and administering compliance programs of diverse financial initiatives within small, medium, and large organizations.
- Spearheaded the compliance initiatives for the State of Tennessee's Department of Treasury that manages over sixty billion dollars in public assets.
- Has led or supported firm responses to SEC, FINRA, and MSRB examination, as well as FBI and other law enforcement investigations.
- Extensive experience with all aspects of securities regulation, sales and supervision, and retail products.



Leeza Shurtz
Compliance Consultant

- Experienced project manager specializing in Anti-Money Laundering (AML) audits for Broker-Dealers of various sizes.
- In addition to managing audits, provides email surveillance reviews, helping organizations maintain robust compliance protocols.
- Assists with 3110 annual audits, ensuring that firms meet the necessary compliance requirements under FINRA Rule 3110 for supervisory procedures and practices.
- CAMS certified. With this, Leeza provides FINCEN, PST and OFAC on-going support for small firms.



Linda Stump
Compliance Consultant

- Over twenty years of experience in insurance and broker-dealer compliance.
- Served as Chief Compliance Officer and Privacy Officer for an insurance-only broker-dealer owned by a large national bank. In this role, she was responsible for the development of compliance and operating manuals, policies and procedures, compliance communications and training.
- Provided compliance review of marketing materials and managed emergency response and business continuity planning and testing.
- Her background also includes Corporate Communications, Human Resources and Operations positions in the insurance and medical fields.



SELECTED PREVIOUS PROJECTS



COMPLIANCE SOLUTIONS

Public Pension Funds – RRS led and completed a comprehensive review of a public retirement system’s investment compliance program. The retirement system is charged with managing more than 30 funds with approximately \$245 Billion in assets under management. The review included evaluating process design, workflow, systems, and key controls for the retirement system’s internally managed public market asset classes (fixed income and global equities, including review of foreign exchange and derivatives practices). The review also included an assessment of policies and procedures to ensure consistency across documentation, obedience to regulatory requirements, and adherence to industry best practices.

Mergers and Acquisition – RRS provided ongoing compliance support related to an investment adviser acquisition by a large investment adviser, indirectly owned by a publicly traded company. RRS drafted client notices and communications, updated disclosure documentation and regulatory filings, facilitated compliance testing and reviews, and provided operational and compliance guidance and assistance throughout the transition.

Policies and Procedures – *RRS* assembled a team to perform a gap analysis and rule matrix mapping of a firm’s written compliance policies and procedures. The firm specialized in institutional sales and trading including investment banking and research. The *RRS* team analyzed the firm’s existing compliance policies and supervisory procedures, operational procedures and supporting documentation including forms and checklist. Based on this review, *RRS* provided guidance to the firm’s senior management designed to strengthen the firm’s compliance and supervisory practices and enhance operational efficiencies.

Independent Consultants – An *RRS* team of consultants served as Independent Consultants in a multi-year engagement for a large international investment company and its affiliated registered investment advisers and broker-dealers in connection with an SEC settlement. The review focused on the use of investment management models, supervision and testing of those models, disclosures in prospectuses and marketing materials, related internal controls and training.

Regulatory Support – An *RRS* Regulatory Consultant provided on site assistance to a Registered Investment Adviser undergoing an SEC Examination. The Consultant served as the liaison between the SEC staff and the client to ensure complete and efficient document production in response to regulatory requests. The examination concluded with no findings by the SEC staff.

Electronic Communications Analysis and Support – Compliance assistance provided to various BDs and IAs with managing electronic communications surveillance, including developing and refining a keyword flagging lexicon, exclusions, and reporting, providing monthly email review and surveillance, and coordinating with CCO on any matters necessitating escalation or further review. Engagements required experience and knowledge of regulatory requirements, as well as in-depth knowledge of surveillance systems including Global Relay, Smarsh, and Rackspace.

FINRA New Member Applications – The *RRS* team has assisted hundreds of broker-dealers through the FINRA New Member Application (NMA) process, including associated regulatory filings with the SEC and applicable states. The *RRS* NMA engagements ranged from small owner-operated broker-dealers to large multinationals, and dual registrants (broker-dealer and investment adviser) whose business models included M&A Advisory, private placements, wholesale distribution, full-service retail broker-dealers, institutional and proprietary trading firms and alternative trading systems. For all our engagements, we leverage our regulatory and industry expertise to develop compliance programs that meet or exceed regulatory expectations.

FINRA Continuing Membership Application – The *RRS* team's experience with FINRA's Continuing Membership Application process and mass transfers of representatives includes ownership changes, business expansions and mergers. We have been engaged to assist large multinational financial services firms manage the regulatory filings relating to mergers and acquisitions as well as complex consolidation. These engagements included mass transfers of representatives, analysis and consolidation of compliance programs, and branch office registrations. Our experience processing applications provides insight to anticipate and address FINRA's questions before they ask.

Compliance Assistance provided to Hybrid BD/IA when Senior Compliance Officer left suddenly, and the firm needed assistance in managing its compliance program. *RRS* assigned a consultant to assist with the compliance program. Some of the services provided were reviewing new RIAs, advertising, reviewing and updating written supervisory procedures as well as training staff, responding to general compliance inquiries, working on special projects, and advising on compliance program direction.

Compliance Assistance provided to a major bank broker-dealer in planning, coordinating, and conducting over 400 branch office examinations on the firm's behalf. In addition to conducting the on-site examinations, scope of work included providing the firm with monthly reports, completion rates, and statistical summary reports of the overall results.

Compliance Assistance provided to a major bank subsidiary through a FINRA Continuing Membership Application ("CMA") process following its acquisition of another broker-dealer, and the ensuing consolidation of the broker-dealer and investment adviser business into a single entity.

Independent Consulting for a broker-dealer resulting from an AWC by FINRA for Firm's failure to make suitable mutual fund class recommendations. *RRS* was retained for the extensive remediation. The wide breadth of this engagement required expertise in mutual funds, suitability regulations, as well as overall regulatory and compliance obligations.

Expert Witness in a FINRA Arbitration involving selling away by a registered representative, and the issue of alleged failure to supervise on the part of the employing broker-dealer. This engagement required extensive knowledge of FINRA Rules.

Expert Witness in a FINRA Arbitration on behalf of the broker-dealer for claims of defamation with regard to comments made on the Form U5 filed pursuant to FINRA rules. This engagement required in depth familiarity with FINRA/NASD rules, policies and practices relative to a member's reporting obligations when completing and filing Form U5.

Independent Consulting for a broker-dealer resulting from an enforcement action by a State Securities Administrator for various violations, including the use of letters of authorization. Engagement required expertise of operations, supervisory, and compliance policies to conduct the required reviews and prepare the reports as mandated in the enforcement order.

Independent Consulting for broker-dealers resulting from AWCs by FINRA related to their failure to identify Net Asset Value (“NAV”) transfer programs. *RRS* was retained to review and assess the appropriateness of the firms’ methodology to identify and compensate affected investors, as well as their written restitution plans to compensate qualified investors. Engagement required extensive expertise in mutual funds as well as overall regulatory and compliance standards

Independent Consulting for a broker-dealer resulting from a Stipulation and Consent Order entered into with a State Securities Administrator encompassing the firm's business and compliance procedures relating to the sales, suitability, supervision, and books and records for fixed income sales. The wide breadth of this engagement required experience and knowledge of fixed income products, requirements of regulatory and industry suitability standards, and FINRA advertising rule requirements.

Independent Consulting for a broker-dealer resulting from an SEC Administrative Proceeding related to the alleged failure to adequately establish and implement policies and procedures reasonably designed to prevent the misuse of material, non-public information. This engagement required knowledge and expertise with regard to the use of material, non-public information, information barrier practices, general supervision, industry training standards, and email communication firewall procedures.




THANK YOU

For more information on how you can manage your firm's risk, please contact us using the information below:

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Bart McDonald - BartMcDonald@RRSCompliance.com

Info@RRSCompliance.com

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www.RRSCompliance.com



Rennaisance Regulatory Services

RRS virtual RFP is a secure and confidential way to get insight and pricing on our wide range of services. Submit your inquiry online from anywhere at any time to schedule a call with one of our team.

Scan the QR code to access the Virtual Request for Proposal:

Request for Proposal

