



*We love Aite-Novarica's work. Your research programs are timely and relevant, and because of that focus you keep us one step ahead of the game—future horizon line insights we can use.*

**LARGE REGIONAL U.S. BANK**

## Financial Services CIO/CTO Advisory

*The CIO/CTO Advisory is designed to serve as your bridge to relevant C-level insights, decision support, and networking. Created specifically for technology leaders in banks, payments providers, and securities and investments firms, this new service helps our clients make better decisions about technology to drive greater business impact.*

### Our Story

Aite-Novarica Group was created through the merger of Aite Group LLC and Novarica, Inc.—two market-leading, financial-services-focused advisory firms. We develop mission-critical insights on technology strategy within a number of key domains, including banking, payments, insurance, wealth management, capital markets, fraud and AML, and cybersecurity.

### Who We Are

We place experienced advisors at the core of our work. Comprising former technology, strategy, and operations executives, our experts leverage deep insights developed via our extensive network of clients and other industry contacts. Their advice is based on years of industry experience coupled with comprehensive supporting data.

### Who We Serve

The new CIO/CTO Advisory practice is designed specifically for senior executives in banks, payments providers, and securities and investments firms that lead the technology function or are responsible for technology strategy and execution. By becoming a member, you will get access to tailored research, expert consultations, and a network of C-level peers that provide decision support for functional and business priorities you and your team are executing on.

### Our Values

Our clients rely on our products and services to support vital business decisions, and we are committed to maintaining our clients' trust. The quality and trustworthiness of our research, insights, and advice is driven by our core values: independence, objectivity, curiosity, and integrity.

### About the CIO/CTO Advisory

Our team advises client executives and their senior teams on:

- Best practices and industry trends on governance and roadmap creation, organizational design, digital transformation and cloud services enablement, strategic planning, and talent
- Collaboration with other functions to align technology with strategic business planning
- Financial services technology/cloud service providers
- New insights and frameworks on enterprise architecture, zero-trust architecture, core systems modernization, and our banking core systems map

### Services

One key executive and their team receive:

- **Direct consultations** with our team on demand, for you and your team, any time, on any topic or issue
- **An annual virtual workshop session** for your team on general trends and best practices in your key product lines or a deep dive on a specific strategic issue
- **Facilitated 1-on-1 conversations** with other technology leaders in our Research Council network
- **On-demand “snap polls”** of our network on topics of interest
- **Access to our knowledge base** of published reports on business and technology trends, vendor analysis, issue analysis, case studies, industry best practices, and benchmarking reports