

Oyster Consulting

Comprehensive Consulting for Financial Services

A seasoned industry practitioner from the world of broker-dealers, Buddy Doyle started Oyster Consulting in 2008 to help protect hedge funds from regulators and plaintiff's counsel, and their investors from undisclosed risks related to the firm's products and services in an efficient way. Today, his company has carved a niche in the sector by providing comprehensive audit, financial, operations, technology, trading, and strategic management consulting. "We follow a unique approach as we develop collective wisdom from our clients and consultants who have come to us from different roles and organizations. We don't set aspirational goals and move on; rather, we rely on practical steps to reach goals and help our clients achieve success," asserts Doyle, the CEO of Oyster Consulting.

Doyle believes traditional methods of investing must align with modern tools and techniques so organizations can achieve higher efficiency and maximize profits. To that end, Oyster offers Oyster Solutions software. Oyster Solutions organizes and automates compliance and operational tasks. Developed and refined by Oyster Consulting's experienced financial services professionals, the software was built to help firms save time and money while achieving compliance.

In addition to offering the software to its clients, Oyster Consulting utilizes it in-house. "On the consulting side, we are going to double our growth in the next couple of years. We have prioritized 2018 to be the year for reorganizing all the procedures, processes, and service culture to meet our 2020 goals," said Doyle.

Oyster Consulting follows a risk-based approach with their clients so they can understand risks the organization is experiencing and develop policies and practices to mitigate those risks. They also provide firm-specific training to their clients to comply with the policies. Oyster's consultants develop and enhance customer's compliance programs by scheduling, testing, monitoring and re-examining the entire process. Oyster Solutions software makes the process convenient and effective. "We provide protection by making the disclosures clear and ensuring that the client's practices are well designed and documented. We do that by understanding the 'ins and outs' of

their processes and eventually molding the necessary adjustments so that they aren't surprised when regulators come in," says Doyle.

The Oyster Consulting team offers management services to show their clients the best ways to be compliant with the resources they have, and when it is advisable to outsource. They also follow operational practices to ensure internal controls are in place to create consistency in performance. The company's



staff comprises best-in-class experts from the finance world who are equally adept in technology and the field of consulting. Their skill set ranges from senior executives to program managers, developers, department managers, and business analysts, along with a broad spectrum of subject matter experts.



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The technology group of the company helps clients make informed decisions when finding the best vendors to partner with by performing cybersecurity risk assessments. Oyster Consulting's financial group offers an outsourced CFO solution, in addition to conducting accounting and financial controls testing. It is safe to say that Oyster Consulting's emphasis on a systematic approach empowers their clients with the necessary knowledge and tools to manage their future.

Maintaining a deep understanding and long-term relationship with their clients is at the top of Oyster Consulting's agenda. Their in-house software and tools are a cost-effective option that fits with the needs of their customers. The Oyster Consulting team has the experience and prowess to evaluate and resolve issues effectively by following methodical and time-tested practices. **CM**