

Treasury Management

Presenter Bio **Brian Cosgrove, Managing Director, Beacon Consulting Group**

Brian Cosgrove has over 20 years of financial services and software development experience working for service providers, investment managers, and technology vendors aligning business needs with technology solutions. He specializes in business process redesign, process automation, and program implementation for middle and back office investment management operations.

Brian is the author and contributor of several whitepapers, and he frequently speaks at industry events and forums focusing on the operational impact of global regulatory change and the successful balance of technology and business process.

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Presenter Bio **Rob Rafferty, Managing Director, Beacon Consulting Group**

Rob Rafferty has over 25 years of experience in the financial services industry with a focus on the development and implementation of operation models, business process redesign, and service provider selection for pensions, institutional securities broker dealers, asset managers, and advisors. Additionally, he is a specialist in accounting, audit, and administration of private equity and hedge fund partnerships. His expertise in these areas has been developed through various operational and executive level positions with securities broker dealers, investment advisors, and alternative asset administrators.

Rob spent several years with State Street Bank and Trust and US Trust, before becoming Chief Financial Officer and Chief Operating Officer of CP Baker Securities, Inc. In 2007 he founded the Boston office of Kaufman Rossin Fund Services. Today he focuses on consulting with asset managers, asset owners, and financial services firms on operational, administration, and control matters. Rob is a Cum Laude graduate of Providence College.
