



Accelerate business performance with software built for the cloud

NetSuite for Financial Services Companies



Today's financial services organizations—from banks, lenders, and brokerages to credit card processors, venture capital, and investment banking—face relentless regulatory change, heightened client expectations, and intense competition fueled by technology disruption. Fragmented legacy systems slow response to compliance demands, complicate operational oversight, and create data silos that stifle growth. NetSuite delivers a unified, AI-powered cloud platform that breaks down these barriers, providing financial institutions with real-time insights, automated compliance, and integrated operations. With NetSuite, firms can rapidly adapt to market shifts, streamline reporting, protect sensitive data, and innovate across every business line—empowering them to excel in a complex, fast-moving industry.

Trusted by:



Key Benefits

- **Adapt to change.** Improve business agility to respond quickly to evolving regulatory requirements and shifting marketplace dynamics, easily scale operations, and quickly adopt new business models.
- **Streamline compliance.** Mitigate risk and simplify compliance with auditable processes and robust enterprise analytics. Ensure security, maintain audit trails, and meet reporting requirements with ease.
- **Drive innovation and efficiency.** Modernize your systems to accelerate time-to-market and support ongoing growth. Eliminate manual tasks and data silos by automating key financial and operational workflows.
- **Improve visibility and decision-making.** Achieve real-time insight into financial performance with customizable dashboards and analytics. Empower stakeholders with timely, accurate information to drive strategic decisions.

“We wanted to hit the market with a sophisticated solution, so our customers could enjoy the best possible experience right from day one.”

Cyle Brodeur, Financial Controller, Beeline

NetSuite Features

- **Financial Management.** Gain real-time financial visibility and control with integrated accounting, secure payment processing, and automated reporting—all designed to support compliance and reduce the time to close.
- **Budgeting and Forecasting.** Create and manage dynamic budgets and rolling forecasts, evaluate “what if” scenarios, and centralize all planning in one system to improve accuracy and organizational alignment.
- **Customer Relationship Management.** Access a single, 360-degree view of every customer and account—enabling personalized, seamless engagement and efficient management of sales and support.
- **Revenue Management.** Automate revenue recognition, billing, and renewals to comply with accounting standards and provide real-time revenue insights, streamlining end-to-end revenue processes.
- **Human Capital Management.** Leverage unified HR, payroll, and talent management tools to simplify processes, automate approvals, and enhance employee engagement and retention.
- **Procurement.** Optimize purchasing, enforce spending controls, and automate procure-to-pay processes for full visibility and compliance throughout your organization.
- **Business Intelligence.** Deliver real-time, self-service reporting and dashboards, combining operational and financial data for complete, actionable insights into performance and compliance.
- **Global Business Management.** Consolidate operations across multiple entities, currencies, and regions in a single platform with centralized control, compliance, and real-time global visibility.

