



Product Name - Client Management Services, or CMS

Product Description – CMS is an online platform that allows users to design, monitor and access current data and business intelligence on changes to their audit client’s business.

Product Benefits – The platform is efficient, insightful and cost effective. It allows you to standardize the type of data and business intelligence across all fund audit clients and provides your Partners with insights into risks they may not be aware of that impact the audit. It can lead to additional audit services and fees and identify opportunities for advisory and tax services. The solution is designed to be consistent with the audit and compliance standards set out in PCAOB Rule QC 1000 and paragraphs 27-30 of AICPA Statement on Audit Quality Control Standard #8.

Product Features

1. **Investment Adviser and Entity Coverage** – CMS data and business intelligence is available on 55,000 global investment advisers and the 450,000+ public and private funds they currently or formerly advised. It is the most complete coverage of advisers and investing entities in the market.
2. **Data-Coverage-Quality Control** – CMS leverages data and business intelligence derived from the Convergence Knowledge Center which contains 6,500 proprietary and non-proprietary data fields structured by Convergence into 36 subjects that define and standardize the measurement of business activities in 55,000 global investment advisers. Time series data covers 13 years.
3. **Independence** – CMS is independent and adds more objectivity to your business intelligence by identifying changes in your client’s business, their key competitors and changes in market conditions that are relevant to your needs. These changes are important because they can create new business opportunities and boost client satisfaction.
4. **Convergence Data as a Service** – Our DaaS service can support you at every stage in the CMS process. You specify the business intelligence that you want and we set up the data and frontend to deliver it. Convergence DaaS provides training on how to engage with your clients leveraging the business intelligence identified.

Product Users – Audit Partners and Risk Management Groups

Get in touch to learn more about CMS

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