



EXPERIENCE. EXPERTISE. EXECUTION. RESULTS. Reference Point provides end-to-end strategy, management, and technology consulting tailored for the specialized needs of the global banking and financial services industry. Founded in 2002, our differentiated approach ensures clients achieve their goals by pairing renowned former C-suite executives with top-tier consultants to deliver practical, innovative, and impactful solutions supported by top-notch implementation.

OUR APPROACH:



EXPERIENCE

Members of our **Expert Network** have held **leadership roles at top financial institutions** enabling us to bring the **right people**, to the right engagements, at the **right time**.

[MEET OUR TEAM](#) ▶



EXPERTISE

Our teams deliver **advisory services** that ensures clients **adapt to changes, reduce risk, improve delivery**, and **drive business performance**.

[SEE OUR SERVICES](#) ▶



EXECUTION

We guide clients from **strategy through implementation and management**, which includes measuring the outcomes and continually **improving our efforts and impacts**.

[VIEW CASE STUDIES](#) ▶

OUR FOCUS:

Leaders look to us for applied subject matter expertise across all facets of financial services, including:



**CAPITAL
MARKETS**



**HOUSING
FINANCE**



**WEALTH &
INVESTMENT
MANAGEMENT**



INSURANCE



**RETAIL &
CONSUMER
BANKING**

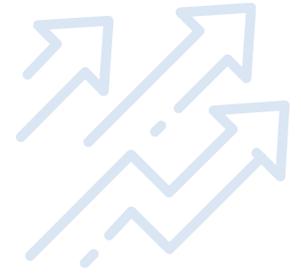


**FINANCE &
TREASURY**



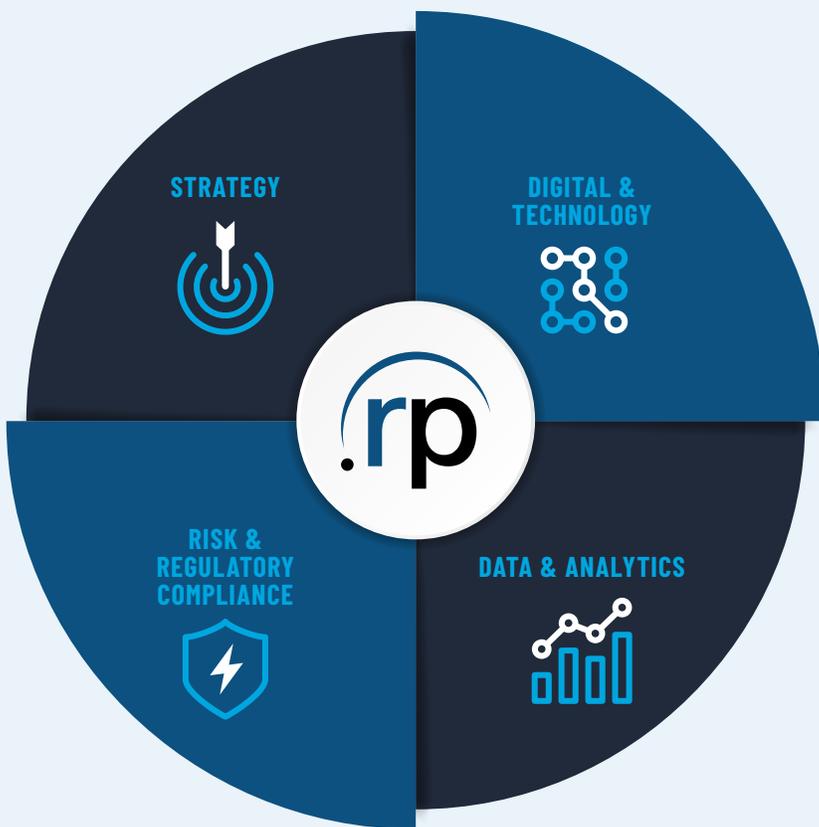
IMPACTFUL OUTCOMES:

- ✔ **Values-driven approach** rooted in integrity, drive, and humility
- ✔ **Customizable, flexible, and scalable** delivery teams
- ✔ **Experience-driven** thought leadership based on real-world experience
- ✔ **Direct, on demand** industry expertise



INTERRELATED SERVICE OFFERINGS:

Our teams partner with clients to **assess strategic challenges and opportunities, create practical strategies, and implement new solutions to drive measurable results.** We focus our offerings across **four key areas:**



STRATEGY

Customized, enterprise-level strategic assessment services for business operations



DIGITAL & TECHNOLOGY

Inclusive set of strategic advisory and implementation services for technology operations



DATA & ANALYTICS

Full-suite of data services spanning data strategy, management, governance, and analytics



RISK & REGULATORY COMPLIANCE

Comprehensive enterprise risk management and regulatory compliance services for business and technology



Talk to us today about how we can help you respond to the evolving market by seizing opportunities, driving transformation, creating business resilience and building an organization that is positioned for the future.

