

AI is changing how financial institutions work. The operating model has to change with it.

Data, decision rights, controls, and the platforms beneath them need to move together. Presidio combines financial services expertise with the capability to advise, build, secure, and operate through that shift.

2003 Founded	4,200+ People worldwide	6,900+ Customers since 2018	60 Global locations	2,000+ Partner certifications
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WHERE WE HELP

Putting AI to work Identify where AI creates value, build it into everyday workflows, and run it with the oversight a regulated business expects.	Building trusted data Establish consistent, governed data for decisions, reporting, and AI, with clear ownership and decision rights.	Improving client and employee experiences Simplify onboarding, servicing, and the contact center so routine work disappears and exceptions route cleanly.
Modernizing platforms Move core, payments, and customer platforms to modern architecture designed for speed, scale, and cost.	Strengthening security and resilience Defend against cyber and fraud risk, and produce the model risk evidence that stands up to regulatory scrutiny.	Running what's been built Operate platforms through managed services and FinOps, so performance stays reliable and costs stay predictable.

WHY PRESIDIO	Industry-led Built around the regulatory, risk, and operating realities your teams live with.	Strategy through operations One partner from executive alignment through production and ongoing operations.	Risk by design Governance, security, and evidence built in from day one, not added at the end.
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IN PRACTICE

\$20B+ INVESTMENT MANAGER A funded path to grow without adding headcount 25+ AI and automation use cases on a multi-year roadmap We translated the board's mandate into a prioritized program, sequenced over multiple years.	NATIONAL LOAN SERVICER Lower operating cost on a modern platform ~\$400M in cost savings, with a technology footprint 90% smaller We moved an on-premises environment to a cloud-first platform, then extended into managed services and security.	WEALTH MANAGEMENT FIRM Stalled AI projects given a clear path forward 50 AI projects no longer held back by policy gaps We extended the firm's cyber program to cover AI, adding 53 controls across 17 newly identified requirements.
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AFTER MONEY20/20 Let's keep the conversation going. Scan a code to connect on LinkedIn →	 Taryn Balthazar Industry Principal, Financial Services	 Manny Rodriguez-Perez Field CTO	 Seth Mirick VP, Financial Services
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