

Capability Statement

Actualize Consulting, LLC, is a management consulting firm that focuses on business and technology transformation. Founded in 2003, Actualize has offices in Virginia and New York. We leverage our core competencies and differentiators to deliver unparalleled solutions for federal and state government agencies and financial institutions.

SMALL BUSINESS

SINs: 54151S, 541611
Unique ID: JC9NN2CNV4J7
CAGE Code: 4ZH29
Contract No.: 47QTCA20D00F3
Dates: 9/17/2020 to 9/16/2025

CORE COMPETENCIES

Management Consulting

- Strategic planning and roadmap development
- Change management and industry-wide adoption solutions
- Counterparty Risk Management
- Research studies and analysis

Business and Technology Transformation

- Process Optimization
- Emerging technologies consulting
- Innovation
- Intelligent Automation (Low code, RPA)
- Elimination of paper and forms
- Technology refresh
- Software assessment and implementation

Enterprise Information Management

- Strategic planning and health checks
- Data governance and compliance
- Data architecture and standards development
- Business Intelligence, reporting, and advanced analytics
- MISMO data standardization and technologies

Information Technology

- Technology integration
- Systems implementations
- Systems architecture
- Project/program management (Agile, SAFE, Hybrid)

DIFFERENTIATORS

- **Housing Finance Experts** – Highly skilled consultants and partners known throughout the industry as leaders and experts. Deep expertise in “life-of-loan”, secondary mortgage markets, affordable housing, mortgage data, and financial instruments.
- **Business Transformation Experts** – Proven capabilities to re-engineer and transition processes, data, and technology from legacy and manual to modern and digital. Enhance organizational effectiveness through change management and culture infusion.
- **Quality Service** – Exceptional CPARS and past performance ratings; significant business from repeat customers.
- **Company Culture** – Ranked as top high-performance company.

PAST PERFORMANCE

- Developed future-state business transformation strategy for Ginnie Mae including operating model, conceptual architecture, analytics, and technology. Created a roadmap for multi-year implementation.
- Developed technology product and trading system for a Government Sponsored Enterprise facilitating a major industry consolidation effort that enabled the exchange of over \$100 billion in mortgage-backed securities. Using an Agile approach, the team integrated industry platforms using APIs and shared data repositories.
- Developed strategy and plan, as well as implemented an Enterprise Data Management program for a financial institution. This program resulted in creating a data-driven business decisioning culture, improved data quality and governance, scalable architecture, efficient processes, and cost savings.
- Developed requirements, data specifications and solutions design, integration specifications, and testing to develop a large-scale government Loan Origination and Underwriting system. The data used the MISMO standards to ensure seamless integration with the agency and their industry partner's applications.

CLIENTS

HUD (FHA, Ginnie Mae)	Securities & Exchange Commission	Mortgage Companies
Department of Veterans Affairs	Fannie Mae	Banks
U.S. Department of Agriculture (USDA)	Freddie Mac	Insurance Companies
Farmer Mac	Virginia Housing	Broker Dealers
Federal Home Loan Banks	Industry Solution Providers	Non-Profits

NAICS CODES

511199 511210 541511 541512
 541519 541611 541612 541618
 Develop 541690 541990

PSC CODES

R408 7030 R431 D307
 AJ96 R799 D318 D306

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