

Cutter Associates

Providing Independent Research,
Custom Benchmarking, & Global
Consultancy for the Wealth &
Investment Management Industry

Tiburon Written Research
December 30, 2025



TIBURON STRATEGIC ADVISORS

Industry Leading Think Tank, Advisor, and Investor in
Wealth & Investment Management (& WealthTech) Firms

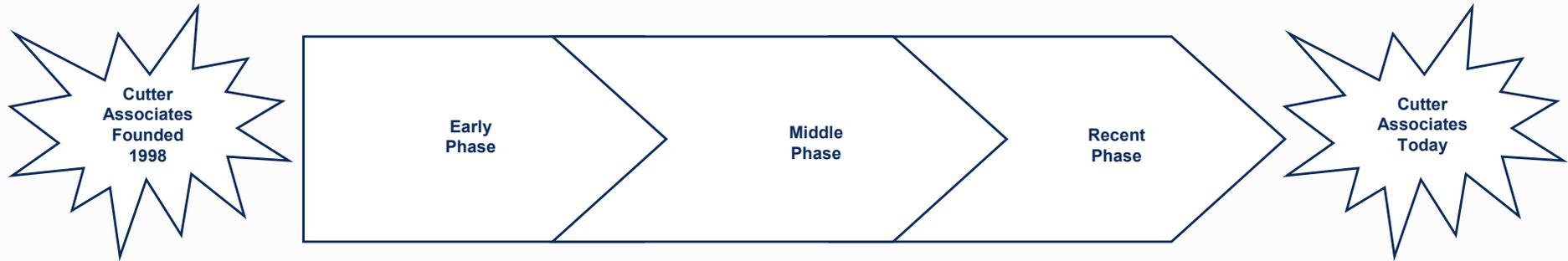


Comments

- **Founded in 1998**
 - **Founded by XXXX**
- **Based in Rockland, MA**
- **4 offices**
- **X employees**
- **X clients**
- **CEO: Cindy Castellano**
- **Privately owned**
- **Web Site: www.cutterassociates.com**

Cutter Associates was Founded in 1998 and Has Subsequently Evolved through its Early, Middle, & Recent Phases

Cutter Associates History



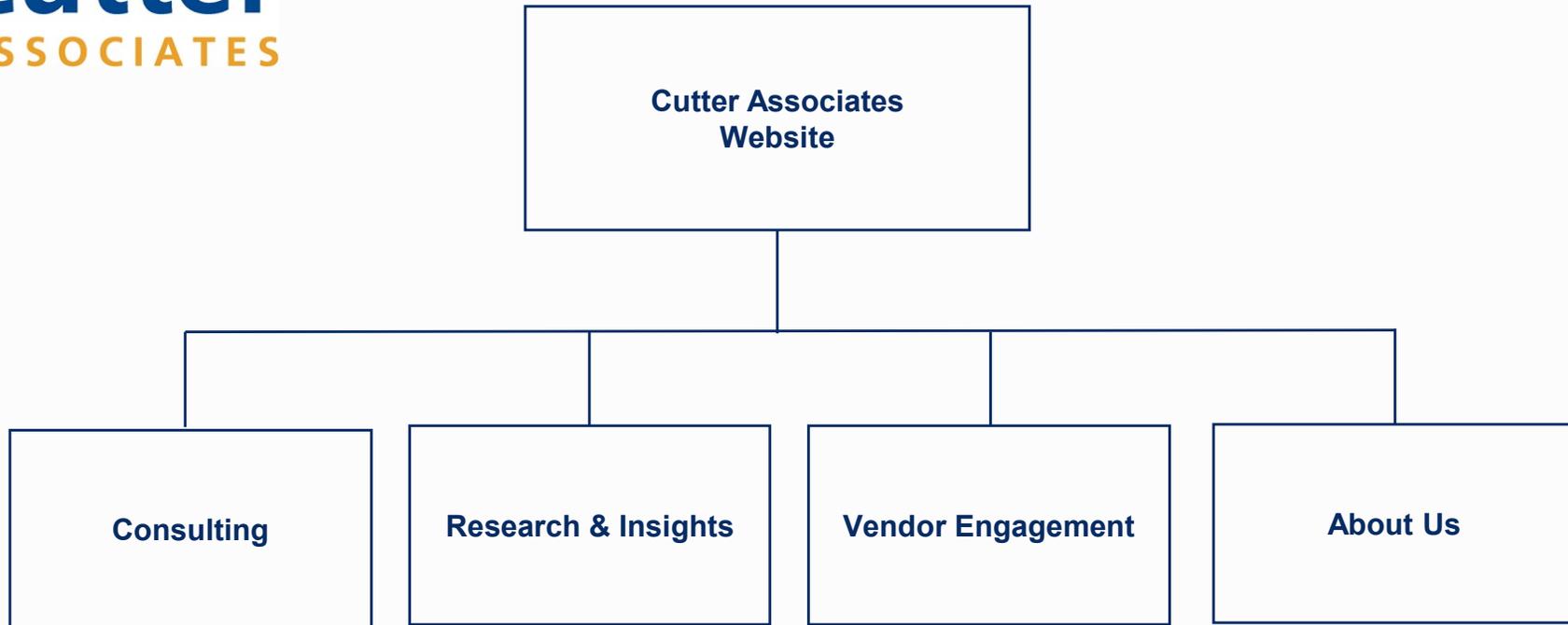
Approximate Dates:	1998 - 2009	1998 - 2015	2016 - 2021	2022 - 2026	2026
Key Steps:	<ul style="list-style-type: none"> 1998: Cutter Associates founded 	<ul style="list-style-type: none"> XXXX: -- 	<ul style="list-style-type: none"> 2016: Acquired by Nomura Research Institute 	<ul style="list-style-type: none"> XXXX: -- 	



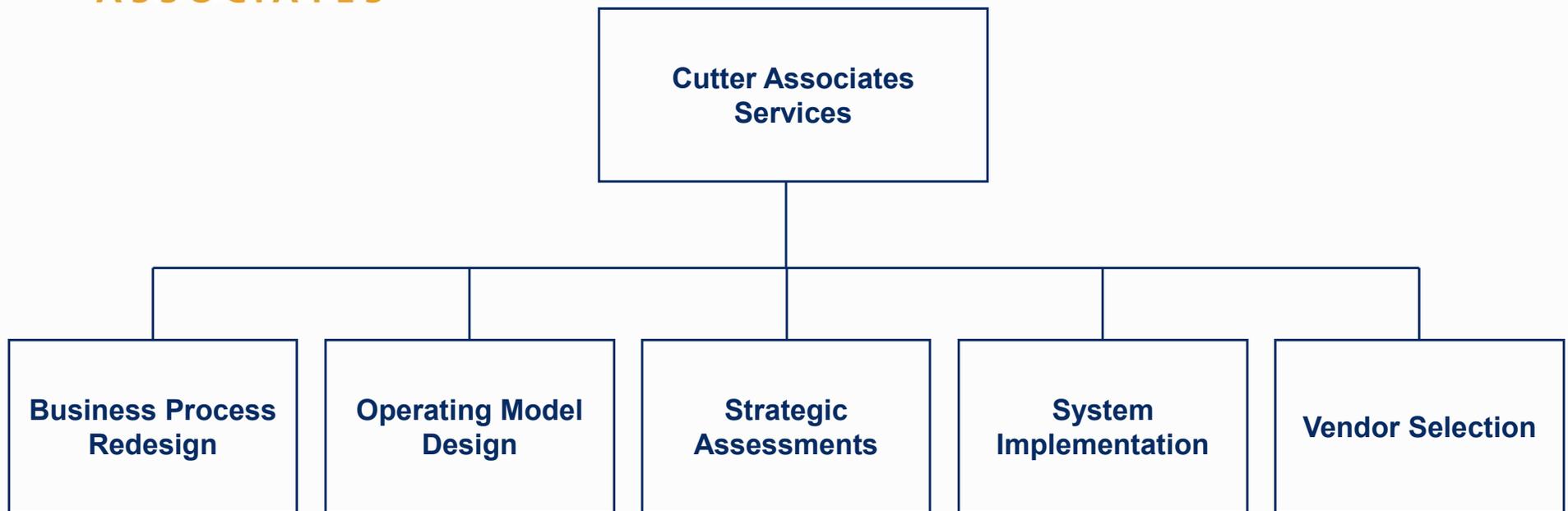
Source: 12/8/25 LinkedIn Website; Tiburon Research & Analysis

Cutter Associates Has a Website with Four Core Sections, Including Consulting, Research & Insights, Vendor Engagement, & About Us

Cutter Associates Website



Cutter Associates Services



Cutter Associates First Service is Business Process Redesign



Comments

- --

Cutter Associates Second Service is Operating Model Design



Comments

- --

Cutter Associates Third Service is Strategic Assessments



Comments
<ul style="list-style-type: none"><li data-bbox="724 479 808 503">• --

Cutter Associates Fourth Service is System Implementation



Comments

- --

Cutter Associates Fifth Service is its Vendor Selection

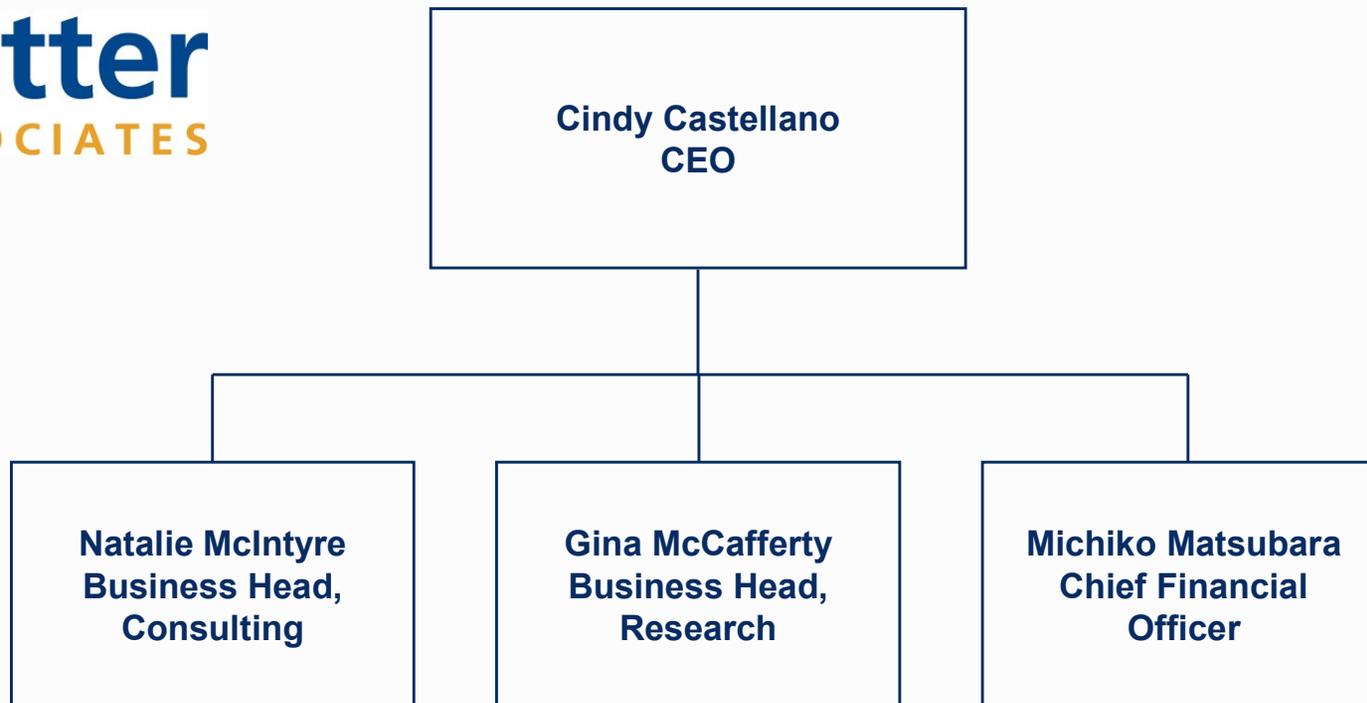


Comments

- --

Cutter Associates is Led by its CEO Cindy Castellano

Cutter Associates Organizational Chart



Cutter Associates is Privately Owned



Comments
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Source: Tiburon Research & Analysis



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