

Case Study

Global Wealth Management Platform for an Asset Management Firm

Client Profile

Client provides investment processing, fund processing, and investment management business outsourcing solutions to the financial services industry. The company operates in different market segments: Private Banking and Trust, Investment Advisors, Enterprises, Money Managers, among others.

Business Challenge

To create a Global Wealth Management Platform that could provide the capabilities for managing transactions, communications, back-office and marketing activities, account management, reporting, business policies, entitlements, document management, portfolio management, and integrated customer management.

Business Solution

Assisted the client in co-development of the Global Wealth Management Platform by connecting various disparate and autonomous systems using Service Oriented Architecture enabling Plug and Play

- Development and maintenance of the Activity Management Track, UI Framework and Infrastructure Services
- Support for Platform Management

Methodology

- Used a Single Integrated Enterprise Data Model
- Deployed a globally enabled, multi lingual, multi currency data model and user experience architecture
- Implemented a messaging based, XML System communication/ integration
- Used a role based User Experience framework.

Impact Achieved

- Was implemented in the private banking division of a global investment bank in the UK
- Provided end-to-end front office, middle office and back office functionalities.
- Provided a Web based system with user friendly UI enabling role based views.