



**At the Heart of
Driving Investment
Efficiencies**

Transforming Global Wealth Management with a Flexible, Integrated Solution

CASE STUDY

Synopsis

Are you able to attract new customers and build a sustainable wealth platform for banks, trusts, advisors, enterprises, and money managers? We helped our client achieve this with a global wealth management platform, the development of which was driven by future-focused, new ideas. Our solution ensured high business value for the client in the form of enhanced end-to-end wealth management functionalities for their customers.

About the Client

As a provider of investment processing, fund processing, and investment management business outsourcing solutions to the financial services industry, the client serves various

private banks and trusts, investment advisors, enterprises, money managers, and other financial companies.

Business Challenge

The client wanted a global wealth management platform capable of managing transactions and communications, accounts, documents and reporting across regions. They also wanted the platform to cover back-office and marketing activities, business policies, entitlements, and portfolios in addition to their integration with the customer management system.

Based on our expertise in financial systems, the client chose us as their IT solution partner for developing a wealth management platform that covered their entire portfolio of services.

Our Solution

We assisted the client in building an innovative global wealth management platform by connecting disparate and autonomous systems using a Service Oriented Architecture based on plug-and-play functionality. This platform sought to offer an integrated view of client relationship and related investments, besides ease of reporting and monitoring to internal stakeholders.

Our team also undertook the development and maintenance of an activity management and tracking system, a UI framework, and infrastructure service. Continued support was at hand for platform management to increase data accuracy and reduce costs.

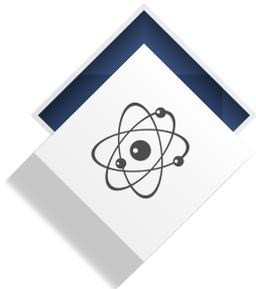
We used a single integrated enterprise data model globally with multi-lingual and

multi-currency support to enhance end user experience. We also implemented a messaging-based, XML communication/integration system, and introduced a role-based user experience framework.

Delivering More Value

Our wealth management platform provided valuable outcomes to the client, including:

- ◆ **More Speed:** With our solution, the client was able to deliver sophisticated office, and of front-office services in a short span of time, leading to better customer management.
- ◆ **More enhancements:** We provided end-to-end front-office, middle-office, and back-office functionalities to better serve multiple market segments faster.



The NIIT Technologies Advantage

Basis our domain expertise, proven models, and relentless focus on quality, the client was able to get an integrated wealth management solution aligned to its end investor and advisor network.



For more information, contact marketing@niit-tech.com

© 2016 NIIT Technologies. All rights reserved.

NIIT Technologies is a leading global IT solutions organization, differentiated on the strength of domain expertise; it services clients in travel and transportation, banking and financial services, insurance, manufacturing, and media verticals. Leading with its service vision "New Ideas, More Value," NIIT Technologies is committed to delivering new ideas combined with operational excellence to provide exceptional value to its clients. The Company is focused on helping businesses design sustainable, optimizable and winning digital operating models, enabling them to become agile, scalable, and flexible. Visit us at www.niit-tech.com

Stay connected:     