

SUCCESS STORIES

# Account view platform modernization on AWS for a leading wealth management firm

## About the Customer



The client is a leading U.S.-based wealth management and advisory services provider supporting a nationwide network of financial professionals.

They offer comprehensive investment and portfolio management solutions to millions of investors. With a strong focus on digital innovation, the firm delivers secure, scalable platforms that enhance both advisor productivity and investor experience.

## Business Problem

The customer's legacy investor portal was monolithic and limited in scalability and performance. It needed to support multiple user types, including investors, advisors, and partners, while accommodating growing business requirements. The platform also required technical updates, cloud readiness, and improved deployment processes to reduce operational inefficiencies.

## Key Challenges



Monolithic Account View application limited scalability and slowed release cycles.



Platform had to serve diverse user types with better performance and customization.



Technical debt from outdated Angular versions slowed development.



Lack of cloud readiness restricted operational efficiency and cost optimization.



## Business Solution

Incedo partnered with the customer to modernize the Account View platform by transitioning from a monolithic system to a scalable, modular, cloud-ready architecture.

The modernization included:



Front-end upgrade to the latest Angular version to reduce technical debt and improve performance.



Micro Front-End (MFE) architecture using Angular Module Federation to decompose the portal into domain-driven modules.



Environment setup, SSL enablement, and domain provisioning to support integration.



Cloud-enabled deployment leveraging AWS CloudFront for content delivery, AWS CloudFormation for infrastructure provisioning, and automated CI/CD pipelines for consistent releases.



Unified Single Sign-On (SSO) experience for secure access across all user types.

## AWS Services Used

- ▶ **Amazon CloudFront:** Content delivery and secure portal access.
- ▶ **AWS Certificate Manager:** SSL/TLS management for secure communication.
- ▶ **AWS Lambda:** Backend automation and API integration.
- ▶ **AWS CloudFormation:** IaaS provisioning for consistent environment setup.
- ▶ **Amazon S3:** Static web asset hosting and version management.
- ▶ **Amazon Route 53:** Domain routing and DNS management.

## Business Impact



Accelerated release timelines through a modular, MFE-driven architecture.



Improved developer productivity with isolated codebases and optimized CI/CD workflows.

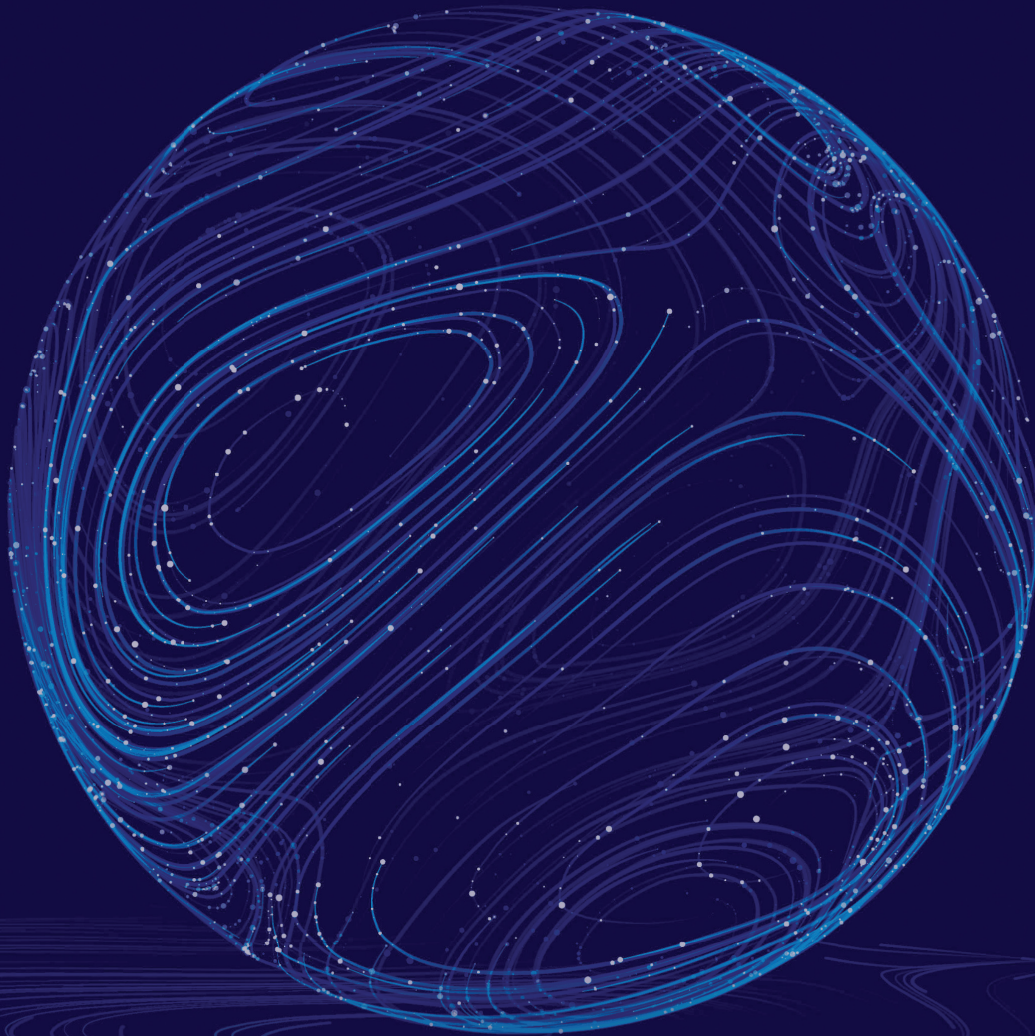


Enhanced scalability and performance using AWS cloud-native infrastructure.



Delivered a unified SSO experience and a modernized UI for advisors and investors.

# incedo



## About Incedo

Incedo is a global AI and data transformation specialist empowering companies to realize sustainable business impact from their digital investments by delivering ROI from AI@Scale.

As a long-term partner for strategy to execution, we operate at the intersection of business and technology. Our integrated services and platforms are built on the foundation of AI & Data, digital engineering, and operations transformation, bringing deep domain expertise and full stack capabilities together.

With over 4,000 people in the US, Canada, Latin America and India and a large, diverse portfolio of Fortune 500 enterprises and fast-growing clients worldwide, we work across banking & payments, wealth management, telecom, hi-tech and life sciences.

**9+**

**Fortune 500  
Customers**

**10+**

**Global  
Locations**

**4k+**

**Employees  
Globally**

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