

Transforming Wealth Management Operations for US based Financial Advisor firm

Key Challenges



- A prominent US wealth manager struggled with an outdated accounting system.
- The legacy software limited their ability to serve a growing client base and hindered scalability.
- Real-time accounting and data accessibility for clients were major challenges.

Business Solution



- > Implemented BetaNxt, a cutting-edge brokerage processing solution.
- > Upgraded infrastructure to the Azure cloud for enhanced features and scalability.
- > Developed APIs to seamlessly integrate BetaNxt with existing systems.
- > Established a cross-functional Agile team for efficient project delivery.

Business Impact



Successfully migrated over 300,000 accounts, 7 million positions, and 60 million tax lots.

Enabled real-time accounting, improving performance and processing volumes.

Streamlined operations for future growth and enhanced client service capabilities.



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