

# Accelerating Data-Driven Wealth Management with MS Azure & Databricks for a Top US Financial Advisor Firm

## Key Challenges



- **Drowning in Data Silos:** Valuable client data was scattered across systems, hindering insights and advisor support.
- **Limited Analytics Capabilities:** They lacked tools for key metrics visualization, what-if scenario modeling, and self-service BI for advisors.
- **Advanced analytics:** churn prediction and AI-powered insights were out of reach.

## Business Solution



- > We built a unified platform on Azure, combining data warehousing, reporting, visualization, and advanced analytics.
- > An Azure-based hub automatically collects and integrates data from all sources, creating a single source of truth.
- > Managing elastic clusters with Databricks, while AI/ML unlocks predictive analytics and self-service pattern recognition.

## Business Impact



Data-powered decisions, reports, insights & ML

5-7% reduction in Intelligent cluster management cost

Agile Deployment, Faster innovation, quicker insights.

 Get in Touch

