



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- A prominent US wealth manager struggled with an outdated accounting system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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