LTIMindtree

New-Age, Cloud-Native Digital Wealth Platform for Financial Advisors

Client

The client works with financial advisors to provide investment management services and is specialized in providing intelligently personalized portfolio management for over **30 years.**

Challenges

The client wanted a foundation of a cloud-based digital platform, enhanced advisor productivity, and a simplified user journey to improve client experience.

The current scenario posed below challenges:

Lack of digital platform to gain insights.

Need for a solution that is more simplified and easier for users.

Poor Advisor Productivity due to lack of tools like aggregated performance reporting, multi-currency trade support, etc.

Unpleasant client experience due to lack of multiple client-facing business practices.

LTIMindtree Solution

- Cloud-Native Digital Platform that uses multiple Azure PaaS services developed in ASP.NET Core with Angular / Kendo UI.

- Using latest UX trends with data visualization enhancing experience and ease of viewing data.

- Automated multiple client-facing business processes like investment proposal creation.

- Data ingestion by financial advisors for capturing customer information – risk profile, assets, etc. to feed into a computation engine.

- Created a foundation of a digital core to drive insights, reduce costs, and deliver enhanced value proposition.

Business Benefits

15%
Reduction in cost of sales

Simplified and crisp user journey, rich interaction points, and visible touchpoint

25%
Reduction in proposal cycle time and higher win rate