



Case Study:

Modernizing Data Architecture and Building an AI-Ready Data Foundation

Data infrastructure is a strategic asset that supports future innovation and enterprise valuation.



Overview

F2 engaged with a growth-minded RIA on a project to modernize its data foundation. The \$15+ billion AUM, planning-oriented firm is private equity-backed and focused on increasing enterprise valuation for an impending exit. The investment in data has made their infrastructure a strategic asset and will facilitate future business automation and deployment of AI for valuable client insights.



Challenge

The RIA was struggling to achieve operational scalability that supported a robust M&A pipeline, as well as organic growth. Their existing data lake and pipelines lacked sophistication and adoption. Without more mature data architecture and governance, the ROI of AI overlays was limited. The foundation needed to be reinvigorated to support modern, scalable solutions.



Outcomes

F2 led the firm's data transformation by providing three critical services:



Established a modern data foundation. We implemented a data quality engine and orchestration layer, enriching the data lake with models from core systems like CRM and trading. These enhancements allowed the firm to deploy two new AI powered automations, saving over 15 hours per week for their operations team.

Built an AI-ready ecosystem. F2 assisted with the firm's pilot of an AI meeting assistant, distilling user feedback into actionable enhancements for the vendor to implement. The tool was successfully launched to 100% of advisors to improve capacity for a higher volume of monthly client touch points.

Increased enterprise valuation. The firm's investment in data moved it into the top quartile among its peers in data maturity and capabilities. That sophisticated architecture is a valuable asset on which future capital partners can deploy high-impact data and AI applications. The operational leverage achieved with F2's automations will reduce needed headcount as the firm grows to \$20 billion AUM and beyond.

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