



TORREBLANC

FROM VISION TO VALUE

ARCHITECTING RESILIENCE FOR A WEALTH MANAGER

Case Study

US BASED SMA/UMA MANAGER

Overview

Client Profile

US BASED SMA / UMA WEALTH MANAGER WITHIN A GLOBAL CUSTODIAL BANK

Assets

50 BN AUM USD / 40K ACCOUNTS

Regions

NORTH AMERICA

Vision

A U.S.-based wealth management firm engaged TorreBlanc to design a scalable, secure investment management architecture. The system needed to support high-volume allocation workflows, safeguard sensitive client data, and integrate seamlessly across both cloud-native and on-premise environments.

Advisory

Execution

Start

End

Vision

Roadmap

Mobilization

Delivery

Value



The engagement began during the vendor selection process and continued through the completion of the project.



Challenges

Architecting Resilience for a Wealth Manager

ARCHITECTURE CHALLENGES: BUILDING FOR SCALE, SECURITY, AND STRATEGIC FIT

Aligning Business and Technical Architecture

A foundational step involved capturing and structuring functional requirements across all wealth management domains. These requirements needed to be translated into a format that could guide both the technical design and the vendor's discovery process.

External Interfaces with Critical Market Infrastructure

Interfaces with third-party systems—including an Order Management System (OMS), a performance engine, and a data aggregator—had to be designed to ensure seamless data exchange and operational continuity.

Scalability by Design

The architecture needed to be evaluated for its ability to scale with future allocation volumes and business growth. This included modeling usage scenarios and stress-testing key components.

Cybersecurity at the Core

The architecture required a cybersecurity framework that aligned with enterprise standards. This included negotiating and documenting security commitments within the vendor's Azure-hosted environment, along with protocols for periodic validation and breach response.

Hybrid Integration Across the Bank Ecosystem

The solution had to operate across a hybrid environment—integrating cloud-native components with on-premise systems within the broader bank ecosystem. Each integration point required validation for security, data integrity, and operational interoperability.

Internal Workflow Enablement

Internal interfaces were required to support client administration workflows. This involved designing integrations with workflow tools to ensure timely and accurate processing of client events.

Approach

Architecting Resilience for a Wealth Manager

BRIDGING STRATEGY, SECURITY, AND STAKEHOLDER ALIGNMENT

TorreBlanc approached the engagement with a dual lens: technical precision and business fluency in wealth management. The solutioning process required more than architectural expertise—it demanded the ability to navigate complex stakeholder dynamics, translate business needs into technical outcomes, and ensure cybersecurity was embedded from the start.

Proposal Generation
Unified Managed Accounts
Tax Harvesting
Custodial Adaptors
Multi-Factor Authentication
Data Aggregation
Interoperability
Reconciliation
Single Sign-On
API Interfaces
IBOR
Overlay Users
Restriction Lists
Target Allocations
Cloud Architecture
Drift Monitoring
BUSINESS FLUENCY + TECHNICAL EXPERTISE
Investment Accounting
Security Substitution
Manager Sleeves
Client Restrictions
Client Reporting
Separately Managed Accounts
Order Management System
Composites
Model Distribution
Financial Advisors



Actions Taken

Architecting Resilience for a Wealth Manager

TRANSLATING COMPLEXITY INTO CLARITY

Business-Driven Architecture Definition

TorreBlanc partnered with business users to capture functional requirements across wealth management domains and translate them into actionable inputs for the vendor's discovery process.

Cross-Platform Integration Management

Working with internal development teams, TorreBlanc validated integration points between cloud-native and on-prem systems—ensuring secure, interoperable data flows across the bank's ecosystem.

Scalability Modeling and Stress Testing

TorreBlanc assessed the architecture's ability to scale by modeling usage scenarios and facilitating stress tests, aligning technical design with long-term business growth.

Cybersecurity Integration Through Collaboration

TorreBlanc collaborated with the vendor, legal, and internal audit to embed enterprise-grade cybersecurity into the architecture. This included negotiating MSA terms, defining breach protocols, and establishing validation checkpoints.

Interface Design Across External and Internal Systems

TorreBlanc led the design of interfaces with third-party platforms—including an OMS, performance engine, and data aggregator—as well as internal workflow tools. This required coordination across multiple teams and a clear understanding of both business processes and technical constraints.

Executive Communication and Stakeholder Management

TorreBlanc served as the bridge between technical teams and executive stakeholders—explaining architectural decisions, facilitating alignment, and driving consensus across business, legal, audit, and vendor teams.





Value Delivered

Architecting Resilience for a Wealth Manager



UNIFIED BUSINESS AND TECHNICAL ARCHITECTURE TO SUPPORT STRATEGIC GOALS

MODELED SCALABILITY TO SUPPORT FUTURE GROWTH AND PLATFORM EVOLUTION

REDUCED OPERATIONAL RISK THROUGH STRUCTURED DISCOVERY AND ALIGNMENT

EMBEDDED ENTERPRISE-GRADE CYBERSECURITY TO PROTECT CLIENT DATA

VALIDATED SECURE, INTEROPERABLE INTEGRATIONS ACROSS HYBRID ENVIRONMENTS

TorreBlanc delivered more than a solution architecture—we helped the client build a resilient, future-ready platform that balances alpha creation with operational integrity. By aligning cybersecurity, business strategy, and technical execution, we enabled the client to modernize their technology stack while managing risk and preparing for scale.



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