

# A Customized Advisor Desktop Platform



Hexaview



## About Our Client

A global investments company dedicated to helping its clients manage and service their financial assets throughout the investment lifecycle. Whether providing financial services for institutions, corporations, or individual investors, they deliver informed investment and wealth management and investment services in 35 countries.

**Location:** New York, U.S.

**Size:** Enterprise



## About Hexaview

Hexaview leverages its Fintech expertise to simplify financial advisors & firms' working lives across the United States by plugging the technology gaps between the numerous software in-house, delegating your tedious tasks to our intelligent applications, developing robust, efficient & dynamic tools, processing data & introducing compatibility between various systems. Hexaview has its flagship product, ReportWa, an automated Reporting Solution, thereby letting you focus on activities that create a more excellent value.

## Time to Market

**Resources:** 10 members team

**Tenure:** 8 months fix bid project

## Client's Challenges

- The client' was finding it difficult to manage the increasing number of advisors in the existing application.
- They wanted to build more analytics on the same platform for better advisor understanding.

## Hexaview's Solution

- We built the solution on Oracle Database for enhanced data management
- We discussed the client's business requirements in detail to flush out the ambiguities
- Worked in tandem with the bank's existing IT team & infrastructure to provide the desired solution

## Impact

- An enterprise system fully built over the existing solution
- Improved reporting
- Practical Compliance and management reporting
- Seamless information flow among applications

## Key Success Factors

- Deployment of engineers with prior knowledge about the domains
- A comprehensive evaluation of business as well as technical requirements
- Tracking the milestones with constant inputs from the client



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