

Investment and Wealth Management Systems

Consultants with unparalleled expertise

Our "IT Gurus" have a long, successful track record at designing, implementing and maintaining a variety of Investment and Wealth Management Systems. No matter the environment (Linux, AIX, UNIX, Windows or Web) or the specific technology, they delivered superior client satisfaction.

Helping our clients succeed

Our Consultants helped these Fortune 1000 organizations maximize their IT infrastructure:

- At **State Street**, they conducted a detailed optimization study of the portfolio management module, and made key recommendations to management that enabled some immediate performance improvements. Thereafter, they complete reengineered the module, leading to impressive gains in productivity and availability. They also replaced the previous contractor's maintenance team, reducing the number of administrators from 14 to only six, while improving responsiveness.
- At **State Street**, they provided comprehensive design and development services for the 529 account compliance system, plus proceeded with a high-level redesigning of the data flows and the Web front-end systems.
- At **Sungard**, they used their specific vertical knowledge and financial systems expertise to help improve a complete suite of enterprise applications which include Retirement Plan Recordkeeping and other Wealth Management applications.
- At **Fidelity Investments**, they developed a Web Station targeted at business sponsors in the companies whose retirement plans Fidelity manages. They also provided data analysis, modeling and development services for ECM Workbench (e401K), a Web-based account management application.
- At **Fidelity Investments**, our "IT Gurus" participated to the design and engineering of a Mutual Fund Performance Reporting application, using NetDynamics application server and Sybase data warehousing. In addition, they created tax reporting & other online applications for the investment community, providing an efficient access to old but sturdy COBOL resources from the Web.
- At **Morgan Stanley**, our Consultants designed, developed & deployed the interface for its online operations, providing users with an easy to navigate Web site combining complete Mutual Fund account management and statistical analysis capabilities. The system runs on BEA WebLogic, connects to a DB2 database, and makes an extensive use of Java technologies (Swing, JSP...).
- At **Merrill Lynch**, using C++ and Java, they worked on many different modules of the client's online brokerage operations, providing a fast and efficient treatment of orders by the mainframe while ensuring backend validation. Execution information was pulled from a DB2 database and operations were automatically logged to a Sybase database.
- At **Liberty Mutual**, our "IT Gurus" participated to the development of a National Market WorkBench, an internal AIX-based WebSphere J2EE application that delivers functionality to users according to their specific role within the organization.
- At **Thomson Financial**, they developed an online research network for money managers and brokers, using Java and Netscape Application Server.
- At **AIG**, they migrated a complex system, including SAP and other financial applications, onto an IBM multi-mode, parallel computing architecture.