JeanMartin

Wealth Management Solution Portal for a leading Investment Services firm

The Client

The Client is a leading provider of investment, brokerage, and private banking and wealth advisory services. The client has a reputation on trust, experience and the highest level of personal service.

The Challenge

Need for an application, which provides centralized access and cater the needs of the employees from various departments of the organization including Client Services, Advisory Services, Operations, IBS, Compliance, Marketing, Product Development, and Systems Administration.

The Objectives

- To develop a web-based application which meets the requirements of the client's employees.
- The following functionalities should be provided: Account Maintenances, Relationship and User Maintenance, Entitlement, Stream Service, Message Center, Activity Center, Offer Fulfillment.
- Vendor integration with Pershing, WSOD and Cash edge.

The Solution

- Understanding of Business Requirement and Functional Requirement with Client
- Understanding of existing applications architecture
- Analysis the technical gaps between the existing systems and client's requirement.
- Development of the website functionality of Offer Fulfillment, Streaming Service and Audit Log by using advanced.
- Designed relation and privileges Meta data tables with references of Pershing Codes to Finaplex Code System for access of data depending on the entitlement of user
- Development of Batch process for data consolidation between Finaplex with vendors like Pershing, WSOD
- Documenting the architecture and design of the application.

Tools and Technologies used

- BEA Weblogic (Application Server)
- Oracle 9i (Database)
- J2EE, JSP, XML (Languages)
- STRUTS Framework