


# zensar

## Creating a **Modular Architecture** and Standardizing **AWS Pipeline** for a **Wealth Management Platform**

 Case study

An  **RPG** Company





## Overview

### From chaos to consistency

Our client is an all-in-one wealth management platform that helps financial advisors save time, strengthen client relationships, and win more business.

Zensar engaged with the client in a consulting assignment and helped create a structured process to collect consolidated data and avoid redundancy while reducing data reprocessing efforts.



## Challenges

### Complex data collection and processing



Multiple data files from different custodians and slow processes were adding to the complexity of managing the entire system



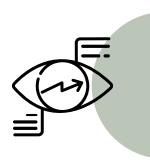
Increased operational costs and the need for various compliances required consolidation of business rules and validation processes




## Solution

Modular data processing and persistence system

 Created a modular architecture for data processing to convert files into a standard data layout

 Designed a data persistence layer to be built on Amazon S3 for better system modularity and data accessibility

 Formulated a structure to change business rules anytime without impacting core business operations



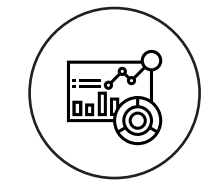
## Business impact

Efficient data collection and usage

With our proposed modular data architecture, the client would experience:



Improved data processing resulting in reduced latency and near real-time data availability



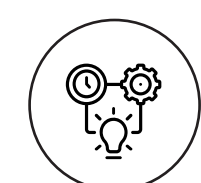
Simplified and standardized architecture that will decrease the onboarding time of new custodian data sets by more than 50 percent



Enhanced data consistency and reduced software usage cost by 30-40 percent



Quick adaption to newer data patterns with dynamic rule definition



Automated data quality validation to eliminate manual DQ efforts



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