HES

Machine learning-powered financial advisory platform for a UK-based company

Fintuity success story

Check out how Fintuity managed to launch an updated fintech platform catering for financial advisory and wealth management. With HES FinTech, it took just 5 months.

Founded in	Markets	Team size	Type	Website
2017	UK	50	Investment advisory	fintuity.com

> "HES FinTech is one of those vendors that offers comprehensive front-to-back solutions with full integration. We feel confident that our new ML platform will allow us to offer clients the best-in-class investment advice services."

Edward Downpatrick
Strategy Director at Fintuity

Challenge

New domain: financial advisory platform development

Fintuity was looking for an experienced long-term technological partner to create a flexible hybrid advisory platform that leverages machine learning and human expertise. HES engineers were tasked with implementing an end-to-end system: from web design and a client portal to the core logic and back-office architecture.

Approach

Using HES LoanBox for automation

The delivered solution is a machine learning-based platform that analyzes data in real time and automatically creates investment plans. The platform is built on the basis of HES LoanBox: some of the modules were re-used, some of them were built from scratch.

4 months
time-to-market

70-75%
automated processes

10 months
Return on investment

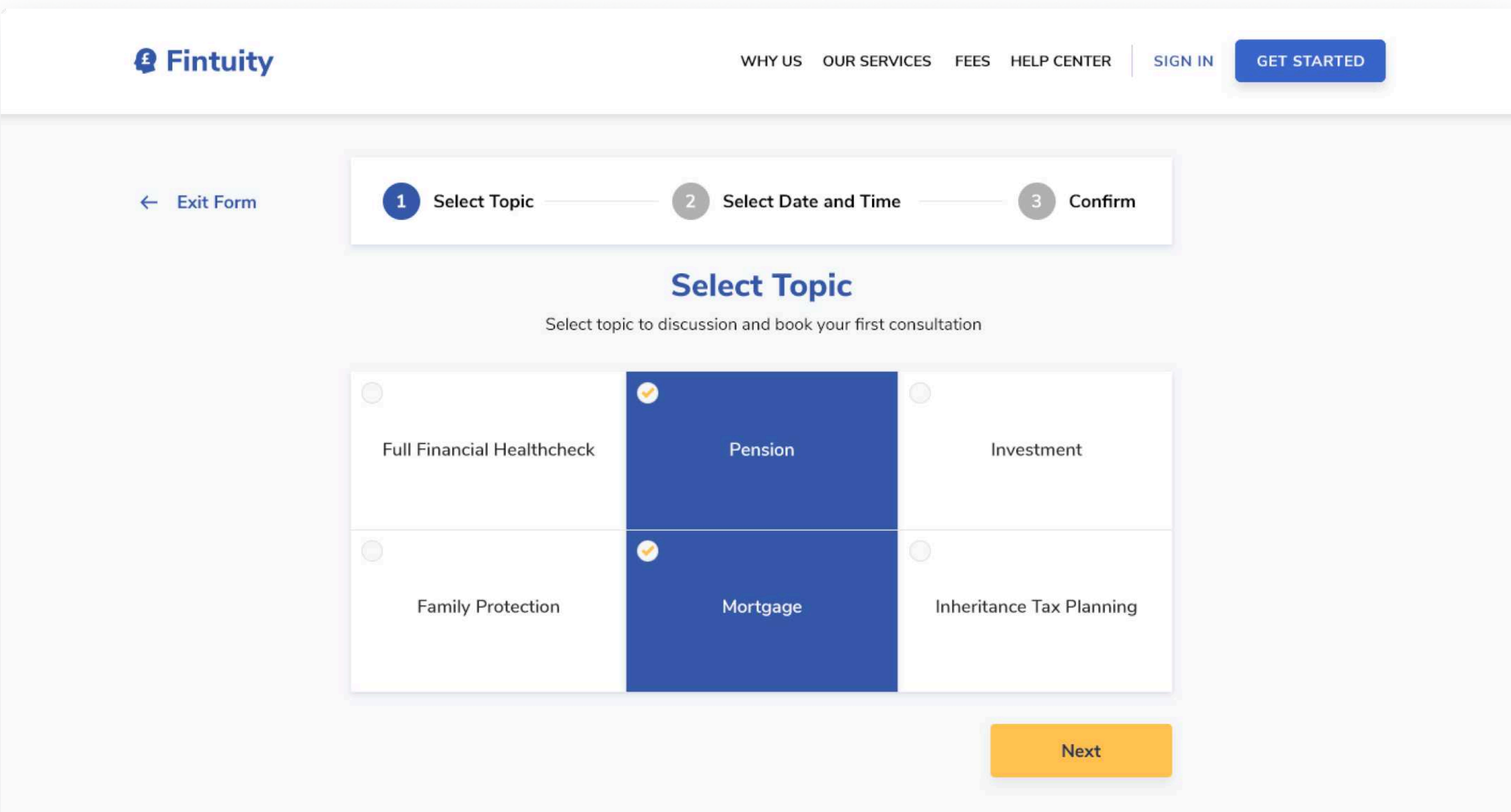
Result

Customized and optimized ML-based advisory platform ready for market challenges

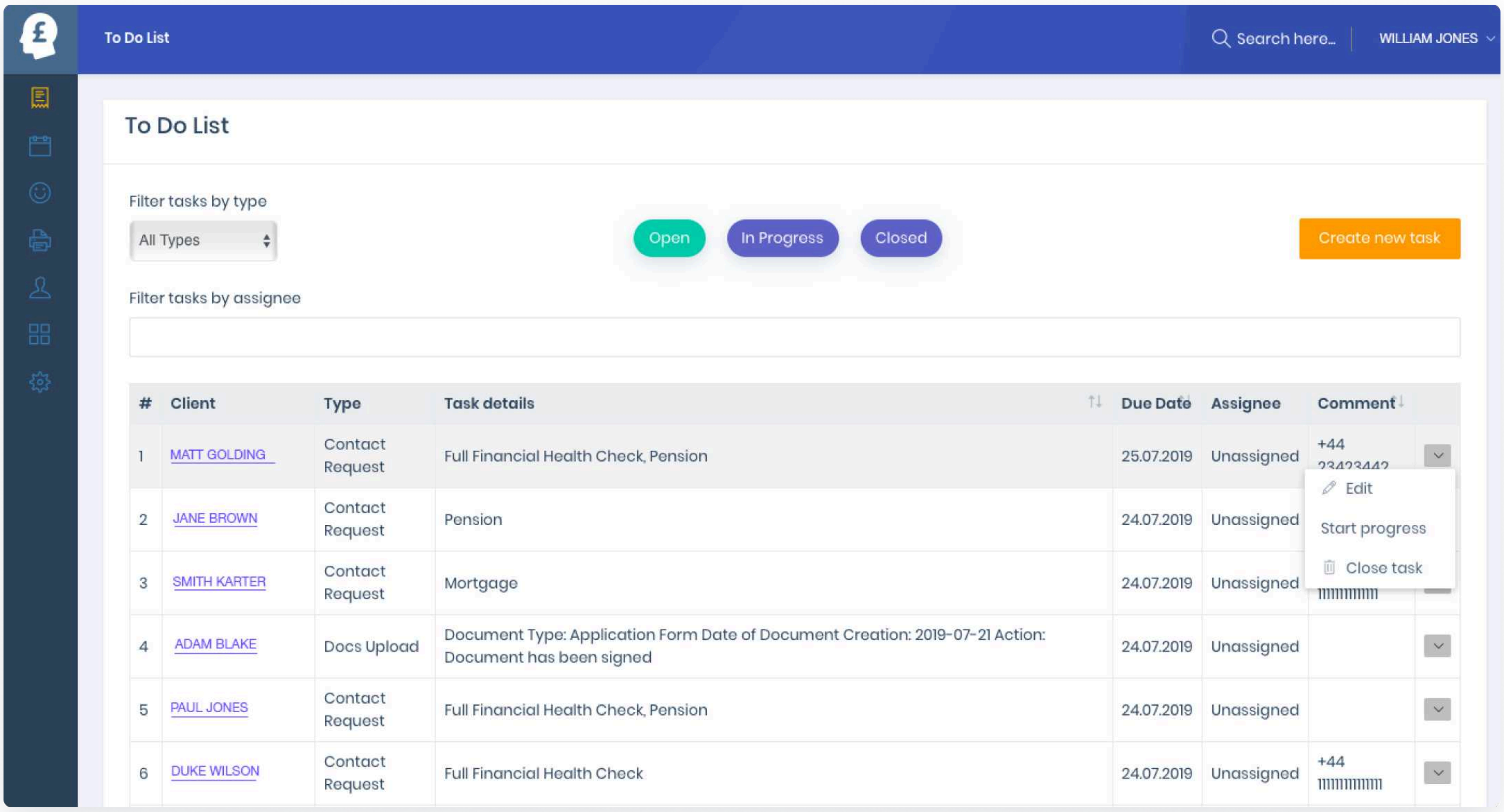
The solution is based on modular architecture and comprises the following elements:

- Roles and permissions for managing system users (IFAs, system administrators, assistants, support specialists)
- Advanced system configuration including security and calculator base settings, KYC profiles
- Template-based document generation
- In detail information about clients and service providers (IFAs)
- Investment plan generation according to the goals of a client

Based on machine learning algorithms, the solution allows each client to take on an appropriate level of risk and ensures that they will not pay excessive fees.



The project outcome is a comprehensive and personalised advisory platform in finance and investment that reviews clients’ financial arrangements, provides automated process management tools and algorithms for faster operations, elimination of human errors, and higher business effectiveness.



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