



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
2017

Markets
UK

Team size
50

Type
Investment advisory

Website
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.



WHY US

OUR SERVICES

FEES

HELP CENTER

SIGN IN

GET STARTED

← Exit Form

1 Select Topic

2 Select Date and Time

3 Confirm

Select Topic

Select topic to discussion and book your first consultation

Full Financial Healthcheck

Pension

Investment

Family Protection

Mortgage

Inheritance Tax Planning

Next

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.

To Do List

Search here... | WILLIAM JONES

To Do List

Filter tasks by type

All Types

OpenIn ProgressClosed

Create new task

Filter tasks by assignee

#	Client	Type	Task details	Due Date	Assignee	Comment
1	MATT GOLDING	Contact Request	Full Financial Health Check, Pension	25.07.2019	Unassigned	+44 23423442
2	JANE BROWN	Contact Request	Pension	24.07.2019	Unassigned	
3	SMITH KARTER	Contact Request	Mortgage	24.07.2019	Unassigned	
4	ADAM BLAKE	Docs Upload	Document Type: Application Form Date of Document Creation: 2019-07-21 Action: Document has been signed	24.07.2019	Unassigned	
5	PAUL JONES	Contact Request	Full Financial Health Check, Pension	24.07.2019	Unassigned	
6	DUKE WILSON	Contact Request	Full Financial Health Check	24.07.2019	Unassigned	+44 23423442

Thank you for your attention!