

Digital Wealth Management Company Expands and Accelerates Through Partnership with Proximateam

Case Study

CLIENT... [REDACTED] Profile and background

Our client: A North American fintech company that develops an end-to-end digital wealth management platform for financial advisory firms of different sizes.

The scope of this project was to provide comprehensive reports of investors' portfolios in different file formats. The customer required a solution that could be integrated with their existing systems, and that also allowed users to customize the look and feel as well as some of the content chosen for these reports.

APPROACH... [REDACTED] We offer the right working model

Proximateam designed and created financial reports for a great variety of portfolios. These were designed and customized to fulfill the external users' requirements and customization.

Our team visited the client's offices for planning, knowledge transfer and team building. Afterward, we worked remotely with their onsite team in Toronto, Canada. Weekly status updates and demos were held throughout the project.

RESULTS... [REDACTED] We delivered!

- Designed and implemented several reports, built according to external client's specifications
- Created different databases on PostgreSQL in the cloud
- Established SSRS as the main reporting platform

VALUE ADDED... [REDACTED] A creative approach to problem solving

- We provided a high degree of dashboard customization (each external client required different personalization)
- Our reports are not only visually pleasing, but they are easily printed and compliant with Canadian regulations
- We closed the technology knowledge gap for tools like SSRS



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info@proximateam.com • proximateam.com