

**Medma Infomatix**

do the impossible!

# CASE STUDY

# Wealth Management Web Application

## Client

A Financial Services Company

## Business Challenge

Client provides personalized guidance to its customers for managing their wealth and investments. Due to absence of any versatile software in the industry the client wanted to develop a bespoke Wealth Management software for managing their customers wealth. There was lack of integrated wealth management tool which can help in seeing the overall picture of wealth and investments in the family by managing assets, planning wealth, Stock management, Trusts, Bank & lending etc.

## Solution

We developed a web based secure platform where clients, CPAs or even insurance professionals can manage their client's wealth with ease. The application integrates all aspects of Wealth Management like Asset Allocation and Diversification, Overall insurance plan, Liabilities, IRA/ Qualified Plan, Stock Options, Business succession planning, Power of Attorney, Gifting to Descendants, Trustee, Wealth Transfer at Death etc. The modules have been created in such a fashion that it is easy to produce overall reports and do analysis for better planning.

## Technologies

PHP, MySQL, jQuery, XHTML, CSS

## Results & Benefits

The application is the most in-depth, powerful and fully integrated online tool of its kind which clients as well as their CPAs, attorneys and insurance professionals are using to provide a sense of control, knowledge and integration of their wealth that they have never before experienced.





