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Accelerating Data-Driven Wealth Management with MS Azure & Databricks for a Top US Financial Advisor Firm

Key Challenges

- Drowning in Data Silos: Valuable client data was scattered across systems, hindering insights and advisor support

- Limited Analytics Capabilities: They lacked tools for key metrics visualization, what-if scenario modeling, and self-service BI for advisors

- Advanced analytics: Churn prediction & AI-powered insights were out of reach

Business Solution

- We built a unified platform on Azure, combining data warehousing, reporting, visualization, and advanced analytics

- An Azure-based hub automatically collects and integrates data from all sources, creating a single source of truth

- Managing elastic clusters with Databricks, while AI/ML unlocks predictive analytics and self-service pattern recognition

Business Impact

Data-powered decisions - reports, insights & ML	5-7% reduction in intelligent cluster management cost	Agile deployment, faster innovation, quicker insights.

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Get in Touch

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