

SUCCESS STORIES

Enterprise-wide Cloud Migration and Operational Transformation

For a Leading US-Based Financial Advisory Group

About the Customer



Manages **\$390 billion** in AUAs and **\$150 billion** in AUMs

Serves Advisors, Tax Experts, Enterprises, Banks, and Credit Unions

The Customer is a renowned financial advisor Wealth Hub that empowers financial advisors and institutions to optimize their control and value creation. With a comprehensive range of solutions, support, and services, the customer facilitates growth, scalability, and transition for financial professionals and institutions.

Key Challenges

The customer faced the challenge of managing the expansive channels and platforms that catered to a diverse range of financial advisors. To address this and to scale up, they sought to embark on an enterprise-wide cloud migration to Amazon Web Services (AWS) as a pivotal step in their digital transformation journey. In addition, they aimed to implement best practices to reduce operational risk and enhance operational efficiency on an ongoing basis.

Business Solution

Incedo came in as a key Digital transformation partner for the customer, bringing in deep expertise in Digital, Data and cloud. The migration program was executed with Incedo taking ownership of the enterprise-wide Cloud infrastructure. This involved re-architecting critical business applications, defining a cloud-native data strategy, and re-hosting legacy applications. The approach encompassed several key stages:



Assessment and Strategy

This phase involved detailed application discovery and assessment to determine the most effective migration approach.



Migration Planning

A comprehensive migration plan was developed, including wave planning, cutover planning, and operations transition strategies.



Target Architecture Design and Deployment

This stage included the setup of a landing zone, AWS Identity and Access Management (IAM) policies, and network security measures to ensure a secure and efficient transition to the cloud.



Cloud Operations

Amazon CloudWatch and AWS X-Ray powered continuous monitoring and optimization, revealing performance insights and cost-saving opportunities. Serverless functions and resources were constantly tweaked for optimal efficiency and responsiveness.

Key AWS services and tools utilized for migration

- **Cloud-hosted Apps:** UI, Java Microservices, Mule Gateway, Drupal
- **Cloud Infrastructure:** RabbitMQ, Rancher/EKS/ECS, NewRelic
- **Connectivity:** AWS Direct Connect
- **DevOps:** Jenkins, Artifactory, Sonar, Fortify
- **API Gateway:** Integration with Amazon API Gateway
- **Content Delivery:** Amazon CloudFront, Amazon Simple Queue Service (Amazon SQS) for messaging
- **Elastic Search:** Self-hosted or vendor-managed.



Business Impact

The customer's enterprise-wide cloud migration delivered several notable benefits, including:

Scalability and Resilience

The infrastructure became highly scalable and resilient, meeting the evolving needs of the customer's clients.

Infrastructure Cost Reduction

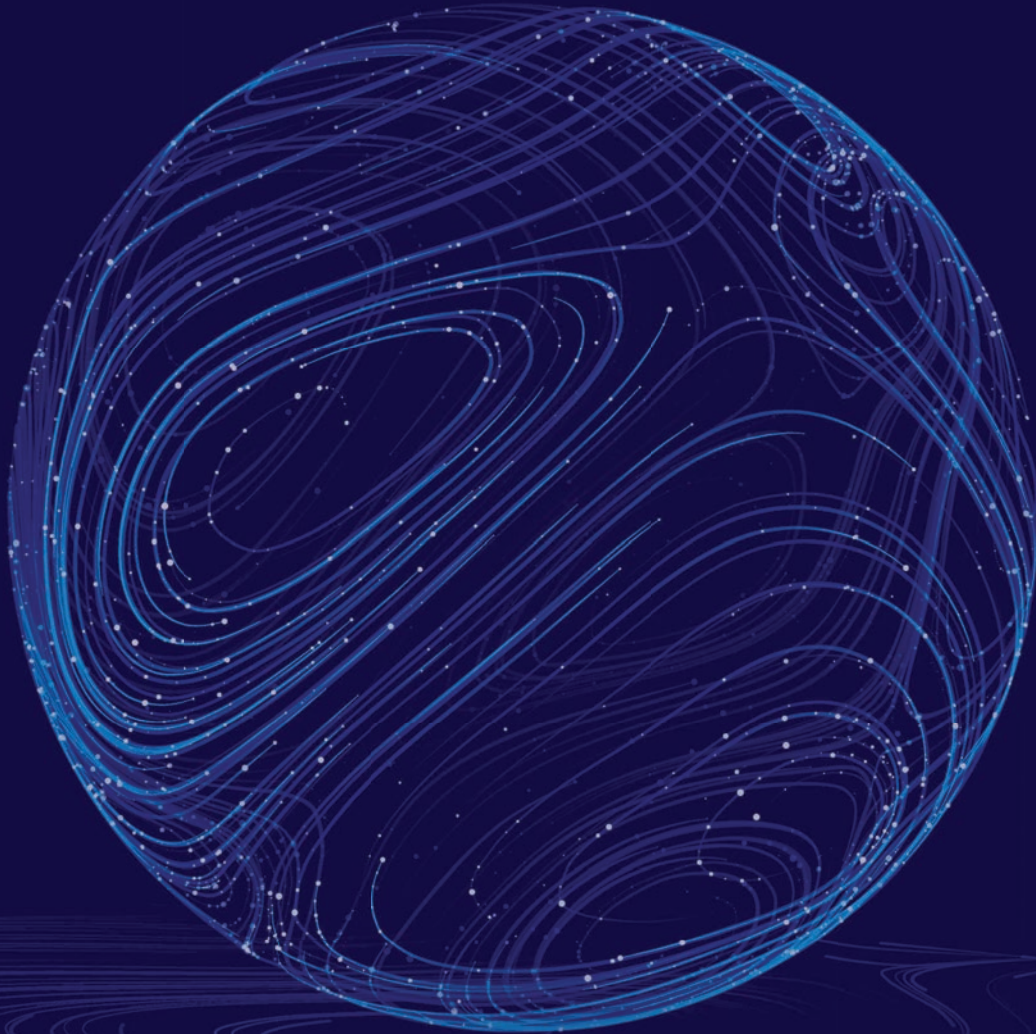
The migration resulted in a significant reduction in infrastructure costs, enhancing cost efficiency and overall performance.

Disaster Recovery

The migration ensured negligible business impact in the event of a disaster.

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incedo | Win in the Digital Age



About Incedo

Incedo is a digital transformation expert empowering companies to realize sustainable business impact from their digital investments. Our integrated services and platforms that connect strategy and execution, are built on the foundation of Design, AI, Data, and strong engineering capabilities blended with our deep domain expertise from digital natives.

With over 4,000 professionals in the US, Canada, Latin America, and India and a large, diverse portfolio of long term, Fortune 500 and fast-growing clients worldwide, we work across financial services, telecom, product engineering, and life sciences industries.

9+

**Fortune 500
Customers**

10+

**Global
Locations**

4k+

**Employees
Globally**

Our Global Presence

India

Gurugram
Chennai
Pune
Bengaluru
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USA

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