

A Platform for Digital Investment Success

How Distillery Took a Digital Investment Platform for Financial Advisors to the Next Level

The Urgency

A developer's digital investment platform was designed to help financial advisors better serve their clients by automating research, identifying problem areas, and streamlining operations.

But to fully optimize the platform, the developer knew that it needed an outside partner with the financial technology experience to get the job done.

The Distillery Approach

To tackle this project, Distillery's experienced nearshore team jumped into action. We started off by making the account opening flow more intuitive and allow for multiple account openings. In order to attract more financial advisors to the platform, this was a crucial step as it enabled them to offer a superior onboarding experience for their clients.

Our team next redesigned the platform's data model and JPA mappings, creating search endpoints, and implementing complex queries to match clients with the best advisors. The team also established metrics, monitoring, and distributed tracing using Datadog, and implemented HTTP observability with Kibana.

One of Distillery's main achievements was developing an advisor marketplace, making it possible to match clients with advisors from a database of profiles. This advanced feature has significantly enhanced the platform's reputation.

Aligning all relevant parties to effectively implement new technologies in the company's fast-paced environment was a challenge. To solve it, Distillery's team created a scheduling service to send reminders to clients and advisors, ensuring timely communications and more effective implementation.

The Results

With Distillery's enhancements, the platform is now more stable and new features crucial for the company's success have been implemented. Through our team's efforts, the platform has achieved:

- Greater Stability strengthening overall system reliability.
- Improved User Experience by offering new features and a more intuitive interface.
- Enhanced Efficiency streamlining onboarding and operational processes.

Today, the platform offers a superior user experience, attracting top financial advisors and their clients.