



ebusinessware

# ebw Wealth Management Services



Custom Technology Solutions



Delivering your solutions  
Following your standards  
Integrated into your environment

## Uniquely Positioned

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Since 1999, ebw has been delivering strategic and technical consulting to the the world's largest financial services firms.

Firms like yours depend on us to build, integrate and run mission critical applications. ebw professionals have extensive experience in financial services and speak your language. We are uniquely positioned to add value and increase speed-to-market on your major initiatives. Our offices in New York, London and Singapore are supported by our wholly owned development center in Delhi, India. We are so confident in our skills and capabilities, that most of our projects are done at a fixed price.

## ebw Wealth Management Services

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ebw has extensive expertise in Separately Managed Accounts, Mutual Funds, Financial Planning, Product Selection, Due Diligence, Account Administration and Trading.

Our Wealth Management Practice can deliver your solution, following your standards, integrated into your environment. ebw provides custom development—no pre-packaged, pre-configured applications. We deliver enterprise applications that are designed and documented so that our clients can support them if they choose.

Rapid Deployment  
Minimal Disruption  
Delivery Focused



## Rapid Deployment

ebw has a team of over 300 professionals that are ready to deploy on your priority project.

Our expertise in Wealth Management enables us to come up to speed fast, with minimal impact on your internal resources. Our onsite teams manage our offshore teams. The average 20-person project requires just 4 people onsite, reducing your requirements for office space and equipment. At ebw, you work only with our onsite teams. We go offshore, you don't.

## Challenging Assignments

When our clients face tough challenges, they call ebw.

We have been asked to:

- Reconcile and report on over ten million transactions
- Accumulate, enhance and validate reference data from thousands of entities
- Migrate 250,000 clients from one Wealth Management program to another
- Develop real-time trading feeds
- Develop web applications integrated into the client's environment to support 12,000 users
- Create single sign-on environments for clients and advisors
- Install and integrate vendor packages into existing IT infrastructure

... And We Delivered

### On Teamwork

*"ebw has completed many major projects for us. They work as an extension of our team."*

### On Quality

*"It was a pleasure to review such well organized and documented code."*

### On Knowledge

*"ebw has a true sense for what we want to do. Their deep knowledge of our business has saved us money, increased quality, and reduced risk."*

### On Response

*"15 people were working on our project within one week of signing the contract."*



ebusinessware



## Contact Us

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### Singapore

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## Professionals

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ebw professionals have deep financial services experience.

We come from successful careers at a long list of top firms such as Citigroup, Goldman Sachs, Merrill Lynch, PricewaterhouseCoopers, Prudential and UBS. We know how to deliver in your environment.

## Clients

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Chances are your firm is already an ebw client.

We have master services agreements in place at most major financial services firms. We can get started right away on your critical initiative. We look forward to talking with you.

## Development Tools & Methodology

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UniRAD, ebw's proprietary development methodology, provides a structured, delivery focused approach.

We use the best process components from the Rational Unified Process project methodology and the Rapid Application Development approach to manage our projects and teams. ebw readily adapts the structure to mirror our client's own internal process.

## Vendor Package Expertise

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Our clients have a significant investment in and around vendor packages that support the Wealth Management business.

ebw has expertise in applications from Advent, Checkfree, IDS, Sungard, DST, PSN, Morningstar and many others. We have integrated, converted, reconciled, fed, integrated, optimized or enhanced these applications across many environments.