

Roadmap

Modernizing Asset Managers' Legacy Systems

Many financial firms relying on Excel, Access, older databases, and other legacy systems are modernizing to increase efficiency and stay competitive. Older applications just don't play well together, which can cause bottlenecks and discrepancies. With our proven reusable components and plug & play templates, UBTI can set you up with seamlessly integrated software and databases. The road to modern systems has never been easier.

Factors forcing legacy modernization

- Lack of integration and traceability
- License expiration or end-of-life support
- Complex reporting requirements
- Increasing customer expectations
- Missed business opportunities
- Obsolete security

Consultation

- Evaluate existing systems
- Guidance on upgrading or transitioning systems
- Select technology and platform

Implementation

- Configure accelerators and templates
- Migration and conversion
- Test upgraded system

Support

- User guides and documentation
- Training on intuitive system
- Flexible assistance throughout

Benefits of modernization

- ✓ **Increased profitability**
Efficient systems allow firms to spend more time on their core business
- ✓ **Faster decision-making**
Integrated Technology allows users to see essential data with just a few clicks
- ✓ **Feature-rich technology**
Modern systems have an abundance of useful features that legacy systems do not
- ✓ **More transparency**
Audit logs record who accesses data and when, along with the source of the data

Contact UBTI today to streamline your data.

UBTI has been serving clients since 1996 and has offices in the United States and Asia Pacific. Through a combination of experience, client focus, and innovation, UBTI has earned reputation as a trusted and knowledgeable technology service provider.

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