Business Process Services

AI-powered Wealth Management Operations Transformation

Flyer

Wealth operations can't be a constraint on growth. As client volumes surge, regulations tighten, and markets remain volatile, wealth management firms need operations that scale instantly, stay compliant, and protect advisor experience—without adding structural cost or complexity. Hexaware helps firms achieve wealth management operations transformation with an always-on, AI-powered model that augments your existing teams and platforms, absorbs volume spikes, and continuously removes friction across the wealth operations value chain.

What This Enables for Wealth Management Leaders

Elastic surge capacity for onboarding spikes, break volumes, and time-sensitive processes

AI-led exception and break management using GenAI and agentic automation to shrink cycle times

End-to-end operations digitalization across onboarding, KYC/AML, trades, settlements, investigations, billing, and portfolio operations

Built-in risk and compliance controls with automated monitoring, fraud detection, reporting, and governance frameworks

Superior CX through faster onboarding and reduced operational friction

Continuous process optimization using Lean, Six Sigma, and analytics to eliminate handoffs, reduce rework, and improve end-to-end process cycle times

This is not outsourcing. It's not staff augmentation. And it's not another tool.

It's a new way to run wealth operations—one designed for tomorrow's pace and pressures.

Turn the page to see how it's done and the benefits for wealth management firms.

How the Model Works

Always-on, AI-powered wealth management operations.

This model leverages:

- AI-led wealth management automation and agentic workflows
- Deep wealth management domain expertise
- Continuous process optimization using Lean, Six Sigma, and analytics

The result: Your core teams stay focused on high-value work.

Challenges We Solve

High manual effort (30–40% SME time) spent on exceptions, breaks, and non-STP workflows	**Onboarding, KYC, and NIGO bottlenecks** causing client friction and compliance delays	**Rigid staffing models and seasonal volume spikes** resulting in a permanent cost drag
Operational congestion slowing digital transformation and process modernization	**Increased governance and risk exposure** from rising fraud, break volumes, and regulatory complexity	**Data migration and unification challenges** across multiple systems, leading to significant effort, delays, and cost overruns, especially during M&A cycles

Wealth Management Operations Transformation Impact

30–50% cost reduction

70%+ manual effort eliminated

Up to 90% faster client onboarding

Hexaware's Wealth Management Footprint

Supporting 120+ financial services clients across 7 countries	Trusted by 10 of the Top 25 asset managers and 4 global custodians

Our expertise spans front-, middle-, and back-office operations, including high-value advisor-facing work such as:

Financial Planning	Investment Review	Billing Audit	Account Trading	Client Service	Tax Preparation	Advisor Transitions

Hexaware helps wealth management firms modernize operations, reduce risk, and grow with confidence—without being held back by legacy ways of working.

Contact us at marketing@hexaware.com to learn more.

About Hexaware

Hexaware is a global technology and business process services company. Every day, Hexawarians wake up with a singular purpose: to create smiles through great people and technology. With this purpose gaining momentum, we are well on our way to realizing our vision of being the most loved digital transformation partner in the world. We also seek to protect the planet and build a better tomorrow for our customers, employees, partners, investors, and the communities in which we operate.

With offices across the world, we empower enterprises to realize digital transformation at scale and speed by partnering with them to build, transform, run, and optimize their technology and business processes.

Learn more about Hexaware at https://www.hexaware.com.