



THE DATA COMPANY

CASE-STUDY



FINIUM

Our Intelligent Data Hub &
Composable Application
Development Platform

CASE STUDY: HURST POINT GROUP

DATA MIGRATION



Wealth Management for the Future

ABOUT HURST POINT GROUP

Hurst Point Group (HPG) is a UK-based wealth management group, backed by Carlyle with current Assets under Advice or Management (AuA/M) of approximately £5.5 billion. The Group was created in late 2019 in connection with the proposed acquisition of Harwood Wealth Management plc that completed in March 2020.

Its predecessor firm, Hurst Point Capital, was set up in early 2019 with support from Carlyle to identify opportunities to develop a broad-based UK wealth management group through an initial acquisition and subsequent activity.

PROJECT

- **The Hurst Point Group (HPG)** have an existing financial planning and CRM platform provided to them by a 3rd party.
- To terminate this agreement, HPG are to provide the 3rd party with a 6-month period for termination.
- On the termination date and not before, client data, documents and PDF fact find will be provided to the customer through a hard disk.
- The 3rd party provider advised HPG that they have no facility to provide data sets prior to the termination date.
- Furthermore, there is no option to extend the notice period which represents a significant risk to the business in the event of catastrophic failure.

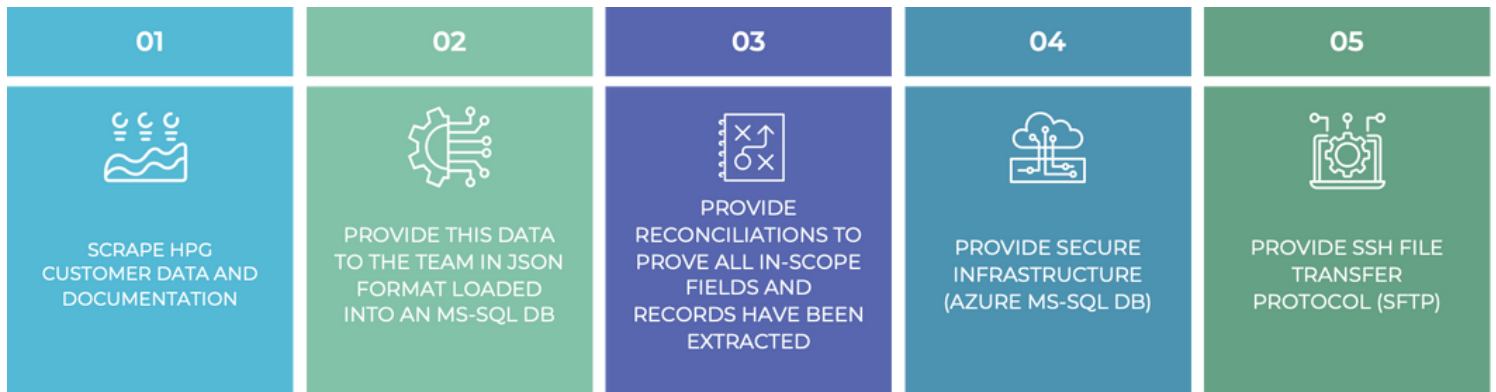
CASE STUDY: HURST POINT GROUP



DATA MIGRATION

THE GOALS

- To **successfully scrape HPG customer data and documentation** from 3 different instances of the 3rd party platform
- To **provide this data to the team in JSON format loaded into an MS-SQL DB** (as used by Iress to transform into Xplan)
- To **provide reconciliations to prove all in-scope fields and records have been extracted together with client and field counts.**
- To **provide secure infrastructure (Azure MS-SQL DB)** from which the data extract will be accessible for nominated individuals as designated by the customer.
- To **provide SSH File Transfer Protocol (SFTP)** for the transfer of data between the supplier and the Customer



CASE STUDY: HURST POINT GROUP



DATA MIGRATION

THE APPROACH

- To support the team with their strategy, TDC embarked initially on a successful POV exercise using test data, to prove the following:
 - That it is possible to extract the desired data from the 3rd party application (incl. complex objects) by scrapping all the data from the existing application.
 - That the data can be made available and saved in a usable format (JSON in MS-SQL db)
 - That all types of documents statements can be extracted
- Post completion of the POV, TDC commenced with the formal extraction process with live customer data as part of the more extensive migration programme to assist with HPG-owned activities:
 - Mapping data to the IRESS schema
 - Transforming the data into the desired format
 - And upload the data into the new IRESS application.

THE RESULTS

HPG have successfully migrated their MVP data and documentation into their new Xplan application, whilst serving their 3rd party provider with notice.

CONCLUSION

TDC can extract data from a 3rd party application (scrapping) to enable use in a transformation and load process.



HOW WE DO IT!

OUR DATA MIGRATION SOLUTION: migrateFINIUM



THE DATA COMPANY FINIUM FRAMEWORK

Our **FINIUM Framework** is comprised of comprehensive set of platforms and solutions designed to **accelerate data projects, enable rapid application development, and facilitate the seamless integration of systems and technologies.**

FINIUM PLATFORMS

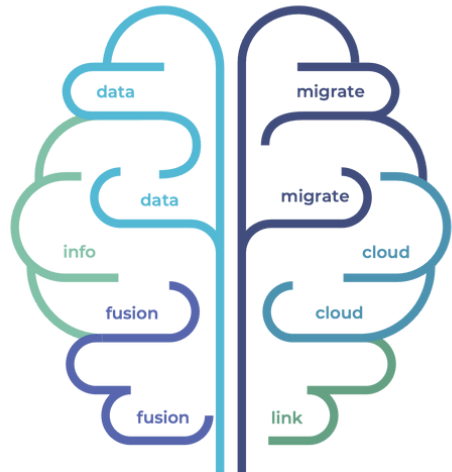
dataFINIUM
Our Intelligent Data Hub



infoFINIUM
Our Composable Development Platform



fusionFINIUM
Our Implementation Methodology



FINIUM SOLUTIONS

migrateFINIUM
Our Data Migration Solution



cloudFINIUM
Our Cloud Solutions: Information and Communications Technology (ICT)



linkFINIUM
Our Technology Integration Hub



migrateFINIUM: OUR FULL DATA MIGRATION SOLUTION

migrateFINIUM is the name of The Data Company's full data migration solution, paving the way for **seamless data migration** which is well-prepared and ready to meet the challenges and requirements of tomorrow, ensuring the **data is future fit**. Meaning, the data is **relevant**, of **high quality**, and **easily accessible** to authorised users. It **scales** with growing volumes and **adapts** to different platforms and systems. Moreover, it **upholds ethical considerations and privacy regulations**, ensuring responsible data usage.

migrateFINIUM is powered by our advanced and highly flexible data platform, **dataFINIUM**, which empowers organisations to migrate their data with confidence.

With over 20 years of experience in insurance migration design, build, and delivery, we have honed **migrateFINIUM** to deliver exceptional results.

**Ready to simplify your data migration process?
Discover the power of migrateFINIUM now!**

**migrate
FINIUM**



HELPING ENTERPRISES ACCELERATE THEIR
DIGITAL TRANSFORMATION JOURNEY AND
TURNING DATA INSIGHTS INTO ACTIONS".

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