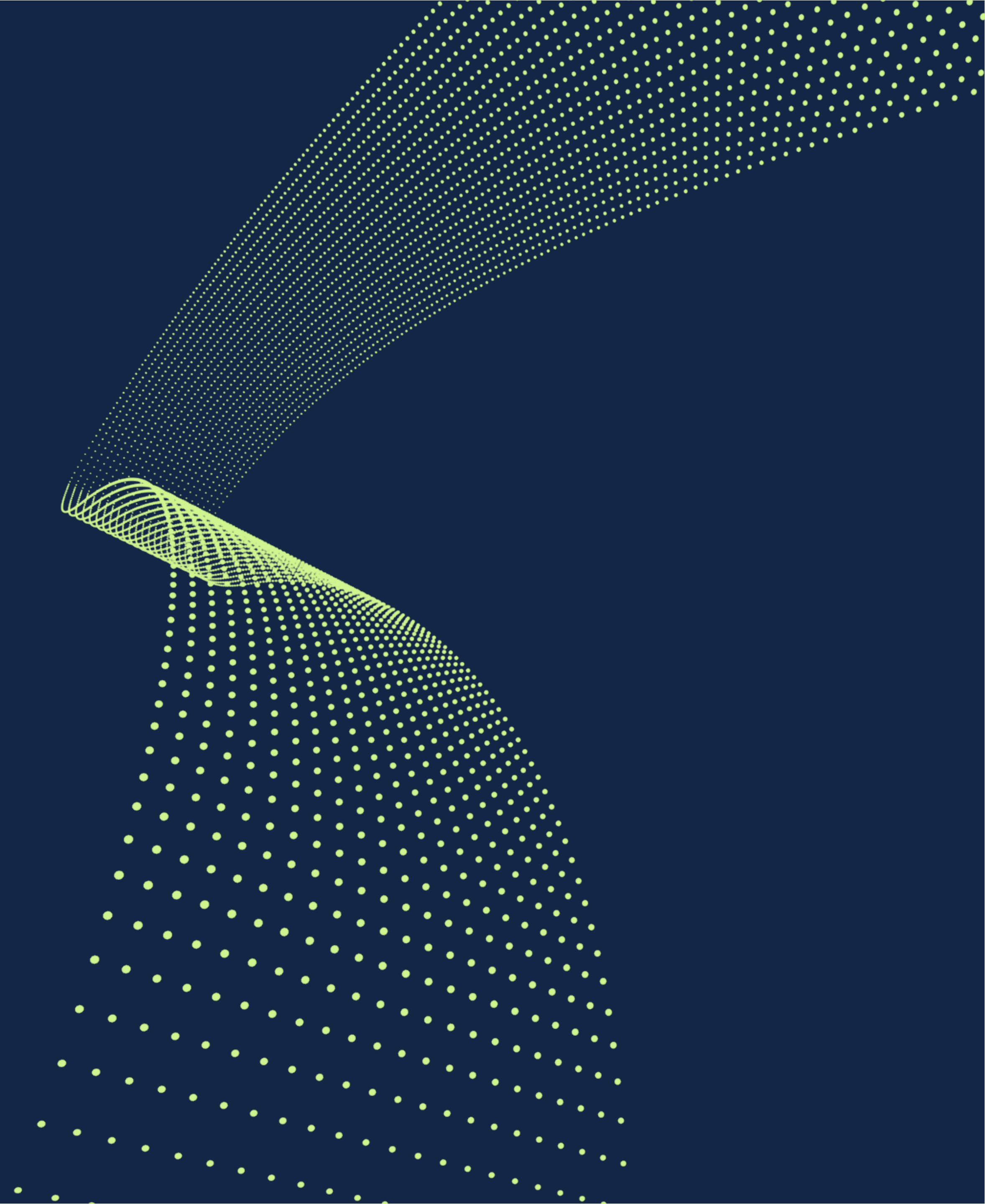


# Citisoft Facilitates Launch of Wealth Manager's Managed Portfolio Service to External Platforms

Citisoft





# The Challenge

Our client, a leading wealth and investment manager with £106B in AUM, embarked on launching their managed portfolio range onto third-party platforms. Originally designed exclusively for their in-house platform, this initiative posed a series of challenges, compounded by time constraints to meet market demands.

Citisoft conducted an initial assessment of the project's scope, deliverables, and target operating model which helped inform a structured plan to navigate complexities arising from engagement with third-parties. Leveraging both project management capabilities and subject matter expertise, the Citisoft team proactively designed, built, resolved, and delivered solutions aligned with the client's objectives. Guided by Citisoft's expertise, the client crafted a scalable model, supporting requirements across operational, legal, compliance, distribution, technology, data, and investments domains.

# The Project

Citisoft spearheaded the initiative to launch the client's Managed Portfolio Service (MPS) across prominent third-party platforms. Managing both the overarching program and individual launch projects within each platform, Citisoft focused on ensuring comprehensive operating models, approved marketing plans, regulatory compliance, and timely execution.





# Major Deliverables

- Designed and implemented operating model
- Initiated marketing and distribution plans
- Resolved all issues related to consumer duty and other relevant regulations
- Executed all required legal agreements
- Successfully launched MPS range on multiple platforms



# The Result

**Citisoft's expertise enabled the timely launch of the client's MPS on three external platforms, with near-term plans for further expansion.**

Despite challenges posed by third-party timelines, the client's requirements were met successfully, while ensuring processes that were scalable, repeatable, with adequate controls and oversight. Citisoft's subject matter experts drove the resolution of issues that arose throughout the project and assisted teams in designing effective operating frameworks. Regular engagement with senior management and the delivery of transparent feedback, observations, and recommendations to the steering committee ensured alignment and progress. With Citisoft's support, our client achieved their objectives and is poised to continue advancing this channel within their business strategy.