

Case Study

Retirement Services Application

Technology:

VBA, SQL Server
2012

Client

Retirement services
planning company

Project Brief: This was developed for the managing and monitoring the finances of the company. The application managed complex financial transactions and reporting.

- This application is used by a retirement services planning company. It is used to maintain and track the money invested by employees of a company in the retirement plans like the 401K plan.
- The company has several clients whose employees invest a portion of their salaries in the retirements plan. In such plans, the employees are responsible for selecting the types of investments (mutual funds, stocks etc) toward which the funds in the retirement plan are allocated.
- The company also has forward linkages with trade partners to whom, the company forwards the employees contributions for investing in stocks , mutual funds etc.
- The application has complex logic to manage all the transactions like keeping account of the contributions made by each employee of all companies, reconciliation of accounts with trade partners etc